



ALM First Launches Inaugural Loan Fund for Credit Unions

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Dallas, Texas – [ALM First](#), a strategic partner for more than 350 financial institutions nationwide, has successfully launched a first of its kind loan fund for credit unions. The ALM First Loan Fund Investment Pilot Program is a groundbreaking new model whereby ALM First can pool funds for credit unions for the specific purpose of buying loans from other credit unions.

"At Pennsylvania State Employees Credit Union, we're always looking for new opportunities to enhance our balance sheet and, ultimately, create more value for our members. We're excited to be among the first credit unions to invest in the ALM First Loan Fund," said Gina Seibert, Chief Financial Officer for Pennsylvania State Employees Credit Union.

The firm will host an investor call to share more details about the first of its kind loan fund and discuss future opportunities for other credit unions to participate on **April 23, 2026 at 2pm Central Time**.

Interested credit unions may [register online](#) or contact us at info@almfirst.com.

The benefits of this structure include shared underwriting and operating expenses to improve scalability, transparent loan pricing for both buyers and sellers, enhanced liquidity options for sellers, an efficient excess cash investment mechanism for buyers, and a clear fee structure. Inaugural ALM First Loan Fund investors include Bank-Fund Staff Federal Credit Union, amongst others.

"We're thrilled to launch this innovative loan fund to benefit both buyers and sellers," said Travis Goodman, CFA and Principal of ALM First. "In our role as a trusted advisor to credit unions across the country, we're among the first to pinpoint emerging trends and industry needs. Innovative solutions such as this loan fund can help clients prudently solve today's challenges while positioning themselves for future growth and stability."



The ALM First Loan Fund Investment Pilot Program, which the firm previously received [NCUA approval](#) to launch, is limited to 30 complex federal credit unions and state-chartered credit unions with federal parity. The fund invests in consumer loans with maturities under 10 years along with overnight investments. Participating institutions are limited to a 50% net worth investment cap.

About ALM First Group

ALM First was founded in 1995 as a strategic partner for depositories, offering an array of financial advisory services. The firm's expertise in asset liability management, investment management, balance sheet strategy, secondary market solutions, and specialty financial services, has allowed it to deliver deeper insights into financial institutions' balance sheets, strengthening their performance and building efficiencies. With approximately \$77 billion of investments under management (as of December 31, 2025), ALM First Financial Advisors is an SEC-registered investment advisor, acting as an unbiased third party, offering commission-free, fee-based services to over 300 financial institutions across the country.

In recent years, ALM First Group has expanded to include several wholly-owned subsidiaries including DDJ Myers, an ALM First Company and ALM First Executive Benefits, LLC. Driven by client needs, the firm now offers various services to help financial institutions optimize their greatest assets – their people.

"ALM First" is a brand name for a financial services business conducted by ALM First Group, LLC ("ALM First") through its wholly owned subsidiaries: ALM First Financial Advisors, LLC ("ALM First Financial Advisors"); ALM First Advisors, LLC ("ALM First Advisors"); ALM First Analytics, LLC ("ALM First Analytics") and ALM First Executive Benefits, LLC ("ALM First Executive Benefits").

Investment advisory services are offered through ALM First Financial Advisors, an SEC registered investment adviser. Access to ALM First Financial Advisors is only available to clients pursuant to an Investment Advisory Agreement and acceptance of ALM First Financial Advisors' Brochure.

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