

UMassFive News

For Immediate Release

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UMassFive Recognized for Outstanding Performance in Investment Services



Hadley, MA – UMassFive College Federal Credit Union (UMassFive) and their team of CUSO Financial Services (CFS)* Financial Advisors have been recognized with the Gold Keystone Award in the medium-sized financial institution category for 2022. This annual award recognizes CFS programs with the highest ratio of GDC per \$1 million of total deposits. This is the second year in a row that UMassFive has received this honor. In addition, UMassFive Financial Advisor, Aimee Marden, has also been recognized for her contributions to this GDC ratio with a CFS bronze Pacesetter Award for 2022.

L-R: Aimee Marden (CFS Financial Advisor), Rich Kump (CEO), James Wage (VP of Retail Services)

UMassFive has offered retirement planning and investment services as a complimentary benefit to their members and the local community for over 15 years. The department is spearheaded by three Financial Advisors: Aimee Marden, Dana Graham, and Sam Einzig, and supported by Senior Investment Advisor Assistant, Emi Lee.

UMassFive's Financial Advisors are available to meet in person as well as remotely, to discuss the retirement planning and investing needs of any local person or business. The team also offers complimentary remote seminars throughout the year to educate clients on an array of retirement planning and investing related topics. For additional information, please visit: umassfive.coop/fis

UMassFive College Federal Credit Union (UMassFive) was established in 1967 and serves the University of Massachusetts, as well as the Five College System and over 50 other local organizations that share their community-based values and vision for a sustainable local economy. As a non-profit financial cooperative, UMassFive's earnings are returned to their membership in the form of better rates, lower fees, and improved services and banking technology. The Credit Union offers a full range of financial products, including personal and business banking and lending, retirement planning and investments, and insurance. UMassFive has over 48,000 members, six branches, and assets of over \$673 million. For more information about UMassFive, please visit www.umassfive.coop.

**Non-deposit investment products and services are offered through CUSO Financial Services, L.P. ("CFS"), a registered broker-dealer (Member FINRA/SIPC) and SEC Registered Investment Advisor. Products offered through CFS: are not NCUA/NCUSIF or otherwise federally insured, are not guarantees or obligations of the credit union, and may involve investment risk including possible loss of principal. Investment Representatives are registered through CFS. UMassFive College Federal Credit Union has contracted with CFS to make non-deposit investment products and services available to credit union members.*