

A man and a woman in business attire are shown in profile, facing each other and smiling. The woman is on the left, wearing a light-colored blazer over a dark polka-dot top. The man is on the right, wearing a dark blazer over a light blue shirt. They are standing outdoors in front of a modern building. The image is framed by a white border.

DAVY

Credit Union Consultancy Services

Together we build a unique union

**Our
unique
difference**

**is understanding
your unique
difference**

At Davy, we understand the unique requirements of credit unions. In fact, our specialist team has been working in the sector for over 20 years, helping our clients achieve their investment goals and successfully navigate the regulatory environment.

We know that you're driven by the need to meet both your strategic objectives and simultaneously provide your members with a comprehensive range of financial services.

We build deeper relationships, enabling us to challenge perspectives and offer quality, thought provoking investment advice. All of this helps you secure long-term prosperity.

We are fully responsible for the assets we manage and are vigilant on your behalf, monitoring the markets to help navigate volatile conditions. Our goal is simple: we are committed to delivering superior investment returns while protecting your existing assets by harnessing the energy, talent and experience of our people.

A comprehensive service offering

Our service has evolved to meet the changing needs of credit unions, expanding beyond our core premise of quality investment advice and developing into an investment advisory oversight service, based around five interrelated areas:





Why we're different

We offer a comprehensive proposition through the provision of bespoke value added services.



We stress test your investment strategy to address any identified weaknesses and adapt to changing market conditions.



We provide extensive income analysis and future projections to assist in the development of your strategic plan.



We prepare detailed research and commentary in relation to developments that will impact the credit union sector.



As a strong and stable entity, Davy has significant resources at its disposal which enable us to provide best-in-class services to our clients.



We take the time to listen, as well as completing our financial and suitability assessments in understanding your credit union, to ensure we can provide the best advice.

Our promise to you



Develop a suitable investment strategy that is aligned to your business model, with a clear focus on regulatory compliance and risk management



Provide quality investment advice designed to outperform the portfolio benchmark



Offer a diversified choice of investments to meet your income objectives



Review performance regularly at meetings and stress test in response to changing market conditions



Create a rigorous governance framework



Deliver exemplary client service via a dedicated team of experienced professionals



Commit to provide informed, objective advice from a strong and stable business partner



Foster a long-term relationship which will meet your needs now and into the future

Meet the team

Advisory team



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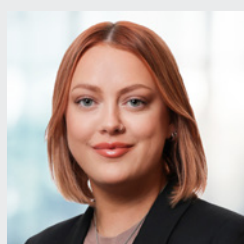
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90+ Years of Experience

Established in 1926, the Davy Group has been managing clients' assets for over 90 years.

900+ Employees

With headquarters in Dublin, and offices in London, Belfast, Cork and Galway, we offer extensive services to a broad range of clients including charities, not-for-profit entities and credit unions.

€24bn+ Assets Under Management*

Our credit union assets under management account for €3 billion of the Davy Group's total assets and our experience within the credit union sector is unrivalled. Our team of professionals provides expert advice in an environment of unprecedented challenges.

The Davy Group is Ireland's leading provider of wealth management and investment banking services, connecting capital with opportunity for almost 100 years. Our experienced team is dedicated to supporting our credit union clients to meet their strategic and financial objectives.

We understand the significant challenges facing credit unions and we focus on delivering an appropriate investment strategy within the regulatory framework. Our aim is to build long-term relationships with our clients based on the shared principles of trust, planning and communication.

Talk to us



We're confident that we can help you achieve your credit union's financial goals. Why not make contact with one of our investment managers today?



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davy.ie/credit-unions

* Source: Davy, all data correct as at September 2024.

Risks

There are risks associated with putting any financial or investment plan in place. There is no guarantee that the financial or investment plan will meet its objectives. The value of your investment may go down as well as up. Please note that these risks are not exhaustive and there may be other risk factors which should be taken into consideration. Fees and charges may apply to products or services that you may decide to avail of as part of the Davy service. For additional information on the risks associated with financial or investment planning and the associated costs, please contact a member of the Davy team.

WARNING:

This information is based on Davy's understanding of current tax legislation in Ireland and is subject to change without notice. It is intended as a guide only and not as a substitute for professional advice. You should consult your tax adviser for the rules that apply in your individual circumstances.

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