

Customised Investment Review and Training Service

With over 20 years' experience Cantor Fitzgerald understands the challenges facing credit unions large and small across Ireland and continues to support credit unions in achieving their objectives.

We are offering credit unions a customised review and training service that covers all aspects of managing your investment portfolio with a focus on new regulations and accounting standards. This tailored package includes a detailed review of your credit union's investment portfolio. A written report will be presented to your credit union as part of a follow up training seminar.



REVIEW

- Investment Portfolio
- Balance Sheet
- Current and Projected Yields
- Valuations
- Regulatory Compliance



TRAINING

- Regulation
- Balance Sheet Management
- Evaluating Investment Options
- Decision-Making
- Record Keeping
- Valuation & Accounting

To find out more call us on **01 633 3669**
or email the Credit Union Services Team on creditunion@cantor.com