



Madison
INVESTMENTS

CREDIT UNION INVESTMENT SOLUTIONS

Customized investment management services with the potential to optimize your portfolio and enhance returns.





EXCELLENCE IN INVESTMENT MANAGEMENT FOR OVER 45 YEARS

Since Madison was founded in 1974, managing client assets has been the sole focus of our company. Our investment professionals build risk-conscious portfolios and strive to deliver excellent investment results and best-in-class service to our clients.

We partner with credit unions to achieve their investment objectives and goals through our offering of actively-managed stock, bond, and asset allocation portfolios constructed to emphasize downside protection.

AT A GLANCE

- ▶ Nationally recognized for our risk-conscious investment philosophy for over 45 years
- ▶ Investment professionals average nearly 25 years of investment experience
- ▶ Investment adviser with a fiduciary duty to its clients
- ▶ Entrusted with over \$19 billion in client assets

INDEPENDENT WITH A FOCUS ON CREDIT UNIONS

Madison is 100% employee-owned. Because our employees are owners, we are only successful if our clients' investing experience is excellent. We make decisions that are in the long-term best interest of those we serve. Our Credit Union Investment Solutions is dedicated to serving the investment needs of credit unions.

CREDIT UNION INVESTMENT SOLUTIONS

Madison's Credit Union Investment Solutions delivers customized investment portfolios based on specific credit union needs. This includes investment strategies that support both NCUA Part 703 investments as well as Non-703 investments that are permissible under certain regulations.

Total Benefits Pre-Funding*

Offset rising employee benefit expenses with potential to increase investment income

Charitable Donation Accounts*

Enhance charitable giving in your community with potential to increase investment income

NCUA regulations offer an opportunity to increase investment income by investing in higher-yielding investments.

NCUA 703 permissible investments, plus:

- ▶ Investment-Grade Corporate Bonds
- ▶ High Yield Bonds
- ▶ U.S. Equities
- ▶ International Equities
- ▶ Alternative Investments

Investment Advisory Services

Optimize your investments with potential to increase investment income based on your balance sheet risk profile

As an SEC-registered investment adviser, we offer fee-based investment advisory services.

*Madison may act as a subadviser on accounts offered through CUNA Mutual Group's Executive Benefit Services.

YOUR BENEFITS

Save time and money by leveraging our team of credit union experts as an extension of your staff.

- ▶ Leverage investment resources and systems of an investment firm focused on the credit union industry
- ▶ Access to expanded investment options under NCUA regulations that offer potential for enhanced portfolio yields
- ▶ Portfolios managed in compliance with federal and state regulations

For more information about
Madison's Credit Union
Investment Solutions,
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Gross assets under management, as of 12/31/2020, unless otherwise indicated.

"Madison" and/or "Madison Investments" is the unifying tradename of Madison Investment Holdings, Inc., Madison Asset Management, LLC ("MAM"), and Madison Investment Advisors, LLC ("MIA"), which also includes the Madison Scottsdale office. MAM and MIA are registered as investment advisers with the U.S. Securities and Exchange Commission. Madison Funds are distributed by MFD Distributor, LLC. MFD Distributor, LLC is registered with the U.S. Securities and Exchange Commission as a broker-dealer and is a member firm of the Financial Industry Regulatory Authority. The home office for each firm listed above is 550 Science Drive, Madison, WI 53711. Madison's toll-free number is 800-767-0300.

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