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## **Tracy Duncan Named Top Financial Advisor**

**Winston-Salem, N.C., February 6, 2015** – Tracy Duncan, a CFP® and CFS Financial Advisor at Allegacy Investment Group, has been honored by Bank Investment Consultant magazine as one of the ‘Top 25 Bank Financial Advisors’ in the country.

The ranking is designed to recognize the most successful bank and credit union advisors based on several key areas such as assets under management, 12-month production, yearly percentage growth and amount of fee-based business. Duncan ranked number 22 in the country.

Duncan has over 22 years’ experience as a financial advisor with 14 of those years at Allegacy Federal Credit Union. He was recently inducted into the CUSO Financial Services, LP Hall of Fame which identifies inductees as an elite group of programs or individuals providing exceptional investment services.

“Tracy is dedicated to the highest standards when delivering investment services to Allegacy members and this award is testament to that effort,” said “Cathy Pace, President and CEO. “His professionalism, knowledge and relationship driven focus for clients helps him to develop personalized plans. Excellent customer service and outstanding investment knowledge help our members put together strategies and clearly defined plans so they achieve their financial goals.”

Financial Advisors at Allegacy Investment Group, available through CUSO Financial Services, LP (CFS) provide a wide array of services to individuals and businesses: including investment, retirement and retirement income planning, life and long-term care insurance as well as estate planning. For additional information, please call 336-774-3400 or visit online at [www.allegacyinvestmentgroup.org](http://www.allegacyinvestmentgroup.org)

## **About Allegacy**

Allegacy is one of the largest credit unions in North Carolina, with members throughout the world. Founded in 1967 in Winston-Salem, Allegacy has a broad membership base open to anyone in our community. Current members also include the employees, retirees and families of over 600 companies throughout the country. Allegacy offers virtually all personal and business financial services. Allegacy Financial Centers are concentrated in the Triad area with 15 convenient locations and eight high school student-run credit unions in the Winston-Salem/Forsyth County School system. For more information, visit [AllegacyFCU.org](http://AllegacyFCU.org).

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*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. Allegacy Federal Credit Union has contracted with CFS to make non-deposit investment products and services available to credit union members.*