



Board/ALCO Training

Working closely with your board, ALCO members, and employees to stay up to date on asset liability management (ALM), liquidity, investment portfolios, and balance sheet management topics is essential for a healthy credit union to flourish. QuantyPhi offers a variety of training courses from introductory to advanced topics to meet your training needs.


Training Topics


- Credit Union Policy Review Basics
- Introduction to CD Issuing and Investing
- Understanding Your Credit Union's Balance Sheet
- A Deep Dive into Non-Maturity Deposit Analysis – Understanding Your Members' Behavior
- Loan and Investment Security Prepayments
- Broker-Dealer Due Diligence
- Yield Curves: Then and Now – What Can We Learn From the Curve?




Key Benefits

1. Keep your board, employees, and committees up to speed on the ever-changing regulations and policies.
2. Stay on top of onboarding and succession planning.
3. Better serve your members with a healthy financial position.

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