



Policy Review

A Policy Review is a valuable tool for credit unions as it identifies areas for improvement and necessary changes to comply with the best practices for IRR management. Ensuring your credit union's policies address requirements by NCUA will always be mandatory. A policy that helps guide your credit union toward best practices, while establishing a clear directive in risk management, is a must. In an interest rate risk sensitive industry, a policy review is imperative to be compliant with NCUA regulations and follow sound practice.

- Experienced, trusted guidance from ALM and investment advisors
- Personalized service, tailored to your needs
- Documentation and reasoning behind suggested policy changes and adaptations
- Advocacy on your behalf with examiners, if you so choose

Key Benefits

1. Addresses NCUA requirements and provides guidance on how to be compliant.
2. Helps credit unions establish a clear directive in risk management.
3. Ensures policies address NCUA Letter 12-CU-05 satisfying Interest Rate Risk Policy and Program Requirements.
4. Assess asset liability management, liquidity, and investment policies.

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