



## New Bank Profitability Workshops Offered by ALM First, Moody's Analytics

For Immediate Release: May 17, 2022

Contact: Sharon Simpson, (240) 620-4095 or [sgsimpsonconsulting@mac.com](mailto:sgsimpsonconsulting@mac.com)

Dallas, TX – ALM First and Moody's Analytics have partnered to offer four in-person Bank Profitability Workshops in select cities this summer under the theme of "Maximizing Your Institution's Value."

These exclusive, educational forums were designed to bring banking professionals critical insights on managing risk and return in a volatile rate environment and maximizing the value of their customer relationships by unlocking strategies to protect and grow profitability.

"We're looking forward to sharing our balance sheet management expertise and insights with bank leaders," says Robert Perry, Principal over ALM and investment strategy at ALM First. "As an unbiased partner to hundreds of depositories, we have a good pulse on how market conditions are directly impacting financial institutions and offer a unique perspective on how to navigate this challenging environment."

Interactive, four-hour workshops, which include a two-hour learning session followed by a networking lunch, will be held from 10am – 2pm local time on each of the following dates:

- [June 7 – Los Angeles](#)
- [July 13 - Seattle](#)
- [July 14 - Denver](#)

There is an additional event on June 8 when ALM First and Moody's Analytics invite registrants to join us at Oracle Park. This educational session will be held from 2:30pm – 5pm local time and will be followed by a unique networking event that allows bank leaders to continue informal conversations while taking in the Colorado Rockies vs. the San Francisco Giants baseball game from a private luxury suite.

- [June 8 – San Francisco](#)

Attendees may earn up to 2 CPE credits. More information and registration details may be found at on [ALM First's website](#).



## **About ALM First**

ALM First Financial Advisors is a strategic partner for depositories, offering an array of financial advisory services. Since 1995, our expertise in asset/liability management, fixed income portfolio management and hedging has allowed us to deliver deeper insights into financial institutions' balance sheets, strengthening their financial performance and building efficiencies. With more than \$78 billion of investments under management (as of March 31, 2022), ALM First is an SEC-registered investment advisor, acting as an unbiased third party, offering commission-free, fee-based services to over 300 financial institutions across the country.

"ALM First" is a brand name for a financial services business conducted by ALM First Group, LLC ("ALM First") through its wholly owned subsidiaries: ALM First Financial Advisors, LLC ("ALM First Financial Advisors"); ALM First Advisors, LLC ("ALM First Advisors"); and ALM First Analytics, LLC ("ALM First Analytics"). Investment advisory services are offered through ALM First Financial Advisors, an SEC registered investment adviser. Access to ALM First Financial Advisors is only available to clients pursuant to an Investment Advisory Agreement and acceptance of ALM First Financial Advisors' Brochure.

The content in this message is provided for informational purposes and should not be relied upon as recommendations or financial planning advice. We encourage you to seek personalized advice from qualified professionals regarding all personal finance issues.