

S O U T H E A S T  C O R P O R A T E

**To: Member Credit Unions**  
**From: Bill Birdwell, President & CEO**  
**October 23, 2007**  
**Re: Southeast Corporate Forms Investment Advisory CUSO**

Southeast Corporate is pleased to announce the formation of Accolade Investment Advisory LLC, a new CUSO which is wholly owned by Southeast Corporate. The CUSO will be led by Gregory Wirthmann, CFA, as President & CEO, with Peter Gibson as Director of Investment Advisory Services.

The CUSO will provide investment advisory services to credit unions, leveraging Southeast Corporate's established expertise in portfolio management. In addition to portfolio management, Accolade will offer a full suite of asset-liability management, bond accounting and investment reporting services.

As a fee-based, non-discretionary investment advisory service, Accolade will provide its client credit unions a holistic portfolio management service designed to free credit union executives to focus on serving their members.

Accolade will draw from the Corporate's combined 130 years of investment expertise as well as its significant investment in credit risk management and interest rate risk systems. Southeast's investments team has a proven track record which will also benefit the CUSO and the credit unions it serves.

To inquire about how your credit union can benefit from this service, please contact Peter Gibson directly at 866-537-7302.



**A C C O L A D E**  
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