

2024 ESL IN THE COMMUNITY REPORT

Wealth Management



ESL Investment Services

ESL Investment Services has grown to oversee more than \$1 billion in assets under management and \$2.2 billion in total assets invested, supported by a team of more than 50 experienced professionals. Through a tailored planning approach, we work with clients to develop strategies that reflect their unique financial circumstances and aspirations. Understanding that every financial journey is different, our team delivers customized solutions designed to address both current realities and long-term objectives.

The graphic features the ESL Investment Services logo at the top, consisting of the letters 'ESL' in a large, white, serif font with a white arc above it, and 'Investment Services' in a smaller, white, sans-serif font below it. Below the logo, the text 'ESL INVESTMENT SERVICES' is written in a white, all-caps, sans-serif font. Underneath that, '\$1 Billion' is displayed in a large, white, serif font, followed by the subtitle 'Assets under management as of December 31, 2024' in a smaller, white, italicized sans-serif font. A horizontal line separates this from the next section, where 'TOTAL ASSETS INVESTED' is written in a white, all-caps, sans-serif font. Below that, '\$2.2 Billion' is displayed in a large, white, serif font, followed by the subtitle 'As of December 31, 2024' in a smaller, white, italicized sans-serif font.

Securities and advisory services are offered through LPL Financial (LPL), a registered investment advisor and broker-dealer (member FINRA/SIPC). Insurance products may be offered through LPL or its licensed affiliates or ESL Investment Services, LLC. ESL Investment Services, LLC, member FINRA/SIPC, provides referrals to LPL and its affiliates. Neither ESL Investment Services, LLC, a subsidiary of ESL Federal Credit Union, nor ESL Federal Credit Union are affiliated with LPL or its affiliates. ESL Federal Credit Union **is not** registered as a broker-dealer or investment advisor. Products and services are offered through LPL or its affiliates by LPL registered representatives doing business as ESL Investment Services. Representatives are dually registered with ESL Investment Services, LLC and LPL and may also be employees of ESL Federal Credit Union. Securities and insurance offered through LPL or its affiliates are:

NOT INSURED BY NCUA OR ANY OTHER GOVERNMENT AGENCY	NOT CREDIT UNION GUARANTEED	NOT CREDIT UNION DEPOSITS OR OBLIGATIONS	MAY LOSE VALUE
--	-----------------------------	--	----------------

Cooper/Haims Advisors, an ESL Company

We proudly marked our five-year anniversary with Cooper/Haims, an important milestone that highlights the expansion of our wealth management capabilities. Cooper/Haims offers a robust suite of fee-based services, including tax planning and compliance and comprehensive financial planning designed to address complex financial needs. Our dedicated team of professionals has \$939 million in assets under management.



ESL Trust Services

ESL Trust Services provides essential trust and estate planning services, helping individuals and organizations protect their legacies and navigate the complexities of wealth transfer. Our offerings include professional fiduciary services, such as trustee and executor services, estate planning assistance, along with investment and financial support for families, foundations, and nonprofits. By serving as a reliable partner, we focus on managing life's work while supporting beneficiaries' futures with care and expertise.

