

For Immediate Release
October 31, 2022



Summerland Credit Union Announces Wealth Management Partnership

SUMMERLAND, BC – Summerland Credit Union and Summerland Financial are pleased to announce a Wealth Management Partnership with Interior Savings Credit Union and Interior Savings Estate Planning Inc.

As a credit union, cooperation and supporting local is in our fabric. We're always looking for ways to make your financial journey even more rewarding by introducing smart solutions to better meet your needs.

President & CEO of Summerland Credit Union, Kelly Marshall commented, "Combining the Wealth Management teams and expertise, we will take all that is great about the two credit unions and make it even better. We appreciate our clients' loyalty over the years and look forward to continuing to serve their needs moving forward."

By partnering with Interior Savings, our clients will have access to a team of experienced Investment Specialists and Wealth & Estate Planners assigned to meet with clients wherever is most convenient for them - in person, at their business, or from the comfort of their living room - and will get to know clients' goals and aspirations.

In addition, we are pleased to announce, clients will have access to the **Investment Solutions Centre**—a team of Mutual Fund Investment Specialists with Credential Asset Management Inc. who offer appointments via video or telephone at a convenient time.

In the coming weeks advisors will be contacting clients to introduce themselves and arrange a time to review current portfolios as well as future planning opportunities.

If you have any questions regarding this change, about investments, or would like to speak with an advisor, please call toll free **1-888-850-6567** or email us at investments@interiorsavings.com.

Summerland Credit Union has been providing financial services to Okanagan residents since 1944. Today, it's one of the longest-running single-branch, independent credit unions in Canada with over 40 employees serving more than 7,700 members with over \$380 million in assets under administration.

-30-

Kelly Marshall, President & CEO | E: kmarshall@sdcu.com | P: 250.494.6060