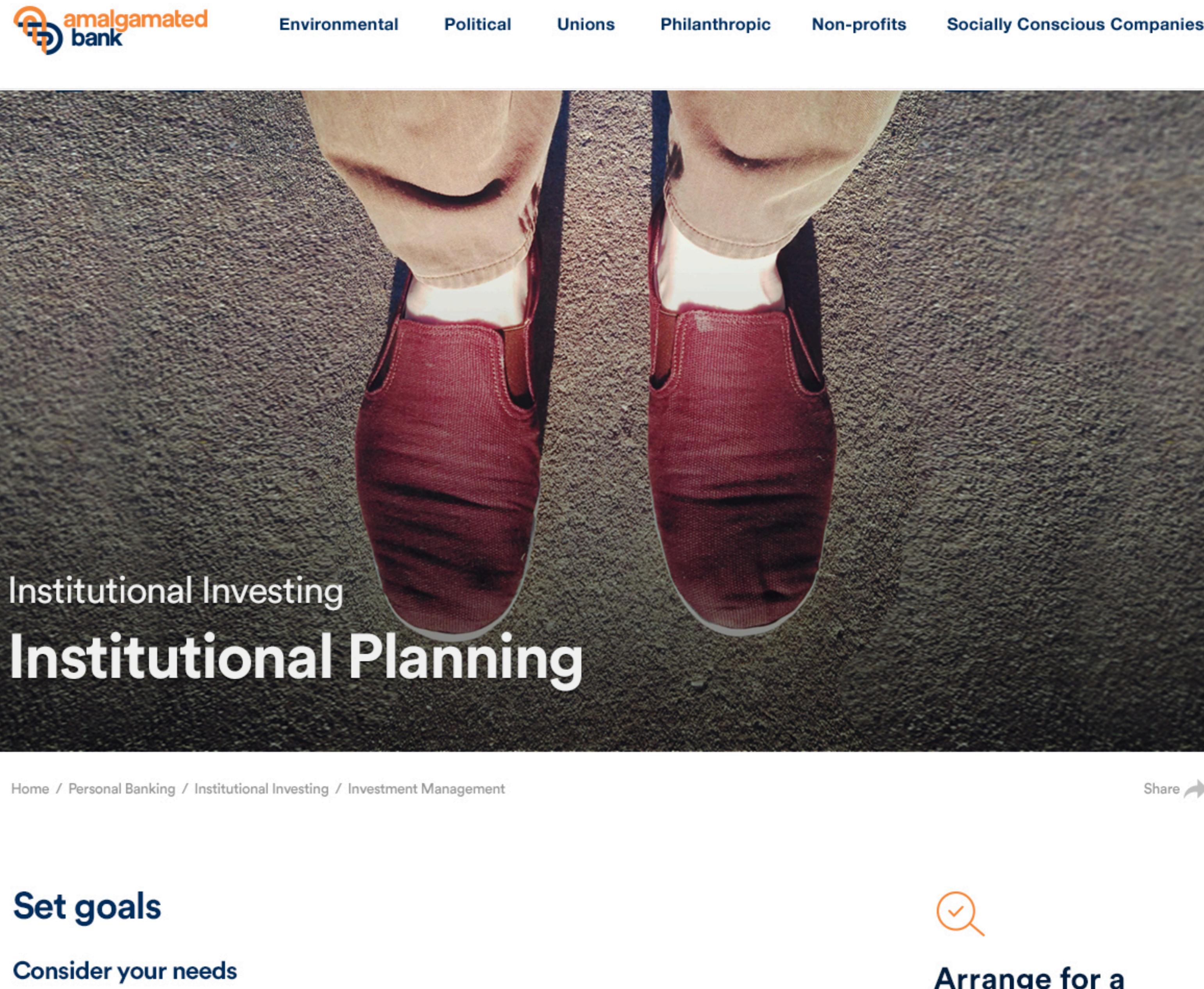




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## Institutional Investing Institutional Planning

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Share

### Set goals

#### Consider your needs

At Amalgamated Investment Services, we know that traditional bank savings products may not always provide the growth, income, or favorable tax treatment you need to achieve your goals. That's why it's important to supplement your savings plans with investment alternatives. Click here to see our Investment and Retirement Products.



#### Arrange for a confidential financial review

Contact an investment representative

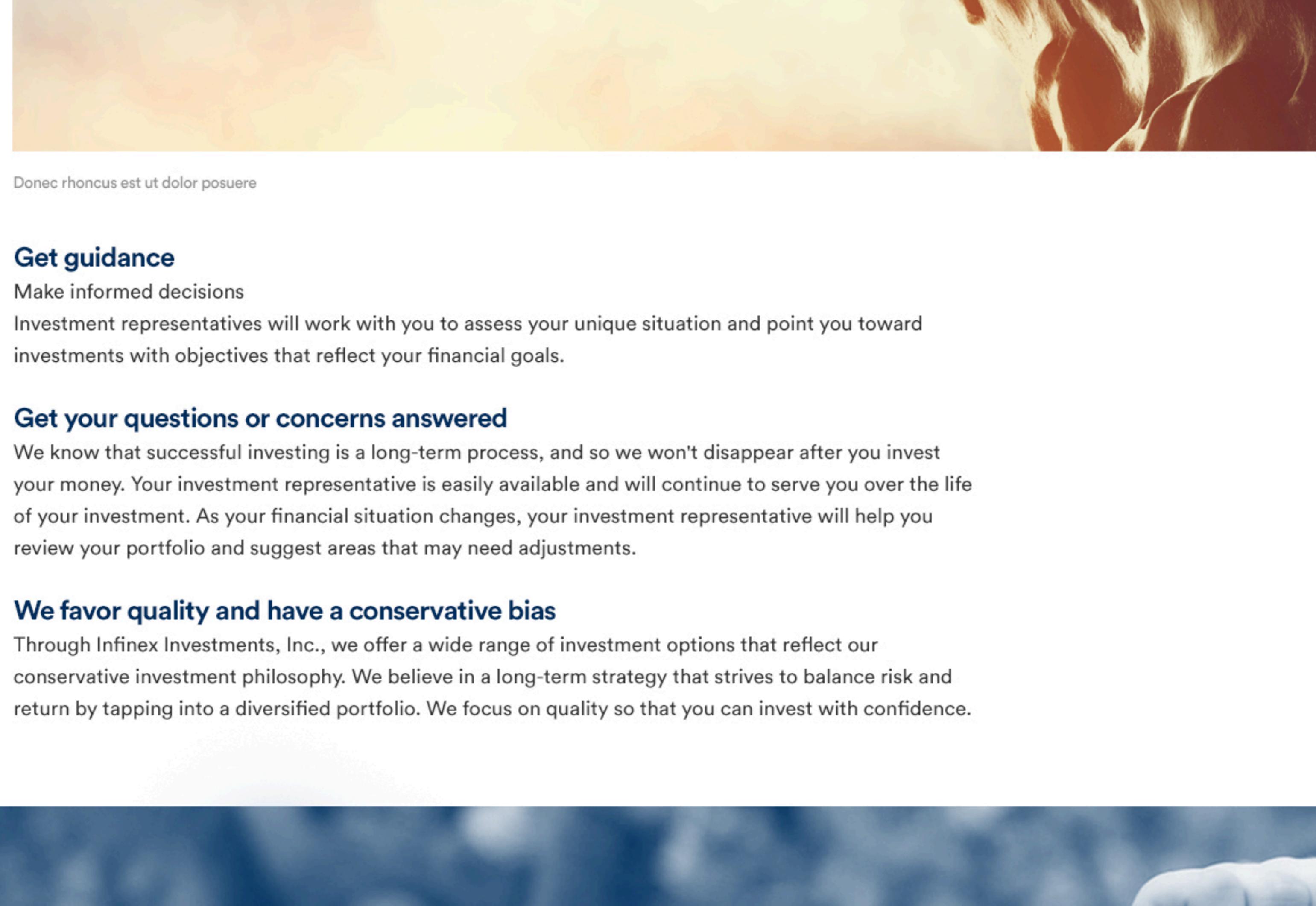
[E-mail us](#)

### Investment Planning

#### Consider your needs

When investing in your future, you'll need to consider your financial needs for today and tomorrow. Answering the following questions may help you gain a better understanding of your investment planning needs:

- What are your immediate financial goals?
- What are your financial goals for the long-term?
- Are you protected in case something happens to your family's breadwinners?
- How do you plan on paying for your children's education?
- What kind of retirement do you envision for yourself?
- How many years do you have before you plan to retire?
- How much will you need to save in order to retire?



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### Get guidance

Make informed decisions

Investment representatives will work with you to assess your unique situation and point you toward investments with objectives that reflect your financial goals.

### Get your questions or concerns answered

We know that successful investing is a long-term process, and so we won't disappear after you invest your money. Your investment representative is easily available and will continue to serve you over the life of your investment. As your financial situation changes, your investment representative will help you review your portfolio and suggest areas that may need adjustments.

### We favor quality and have a conservative bias

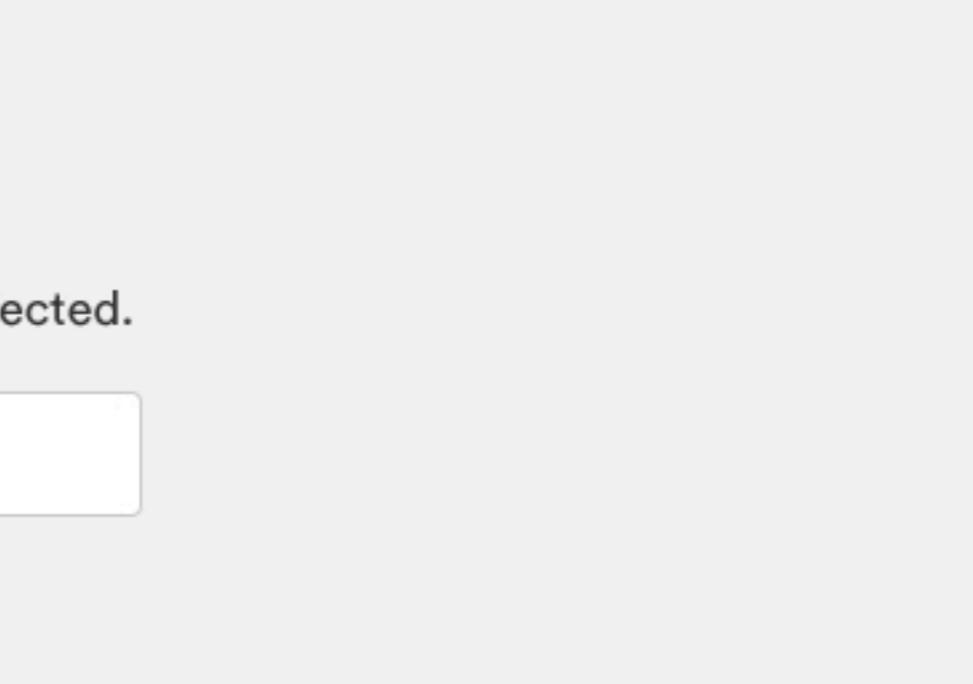
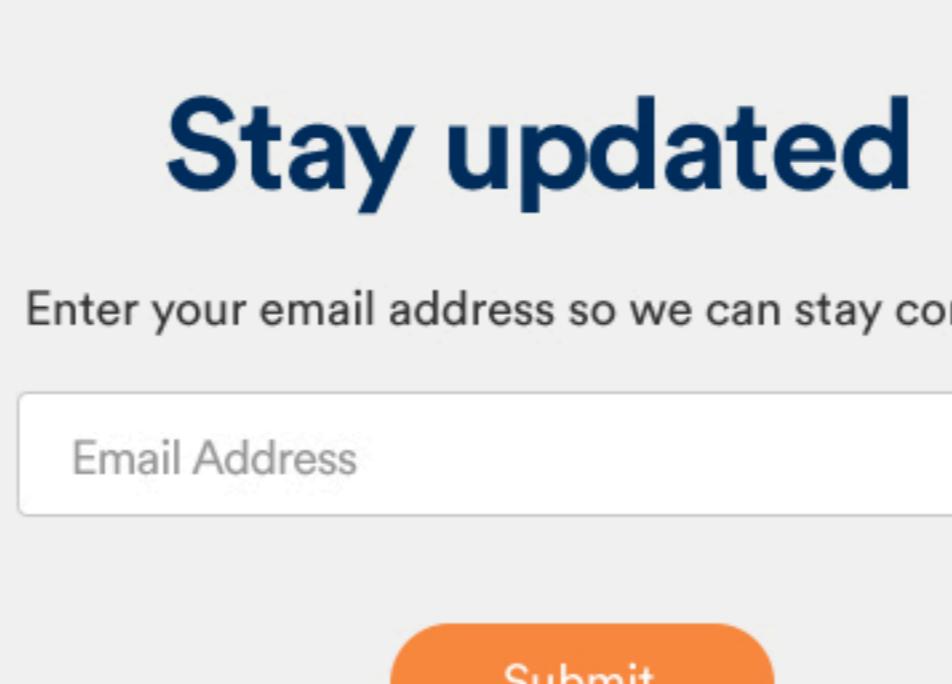
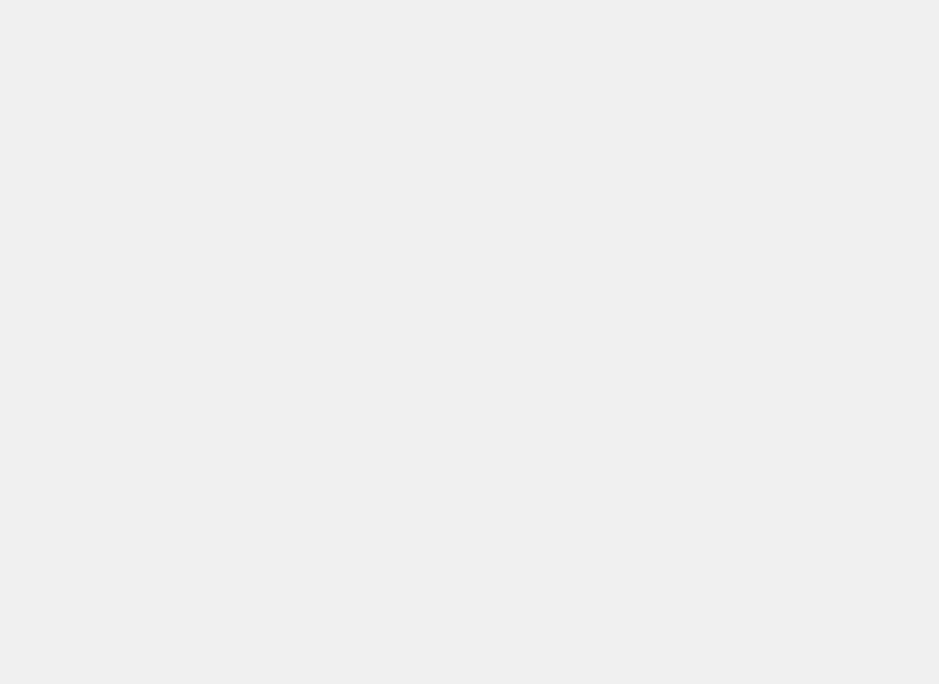
Through Infinex Investments, Inc., we offer a wide range of investment options that reflect our conservative investment philosophy. We believe in a long-term strategy that strives to balance risk and return by tapping into a diversified portfolio. We focus on quality so that you can invest with confidence.

## Find out what we offer Unions

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## How we're different



### What it means to "B" responsible

Our unending commitment to proving it is possible to be both a strong financial institution, and a force for positive change.

### Insights

The Amalgamated Blog is a space for leaders to share their expert take on the events and trends shaping finance and global affairs.

### Amalgamated Impact Report

Read our Impact Report and see how we're helping those who do good, do better.

[View Impact Report](#)

Investment and insurance products

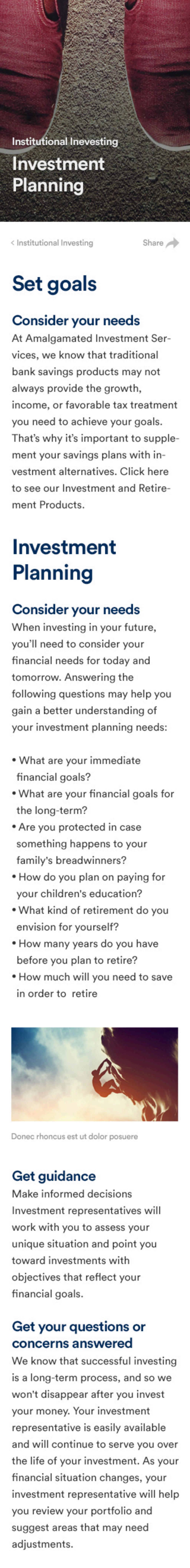
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- May Lose Value Including Loss of Principal
- Not Insured by Any Federal Government Agency



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Institutional Investing

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### How we're different

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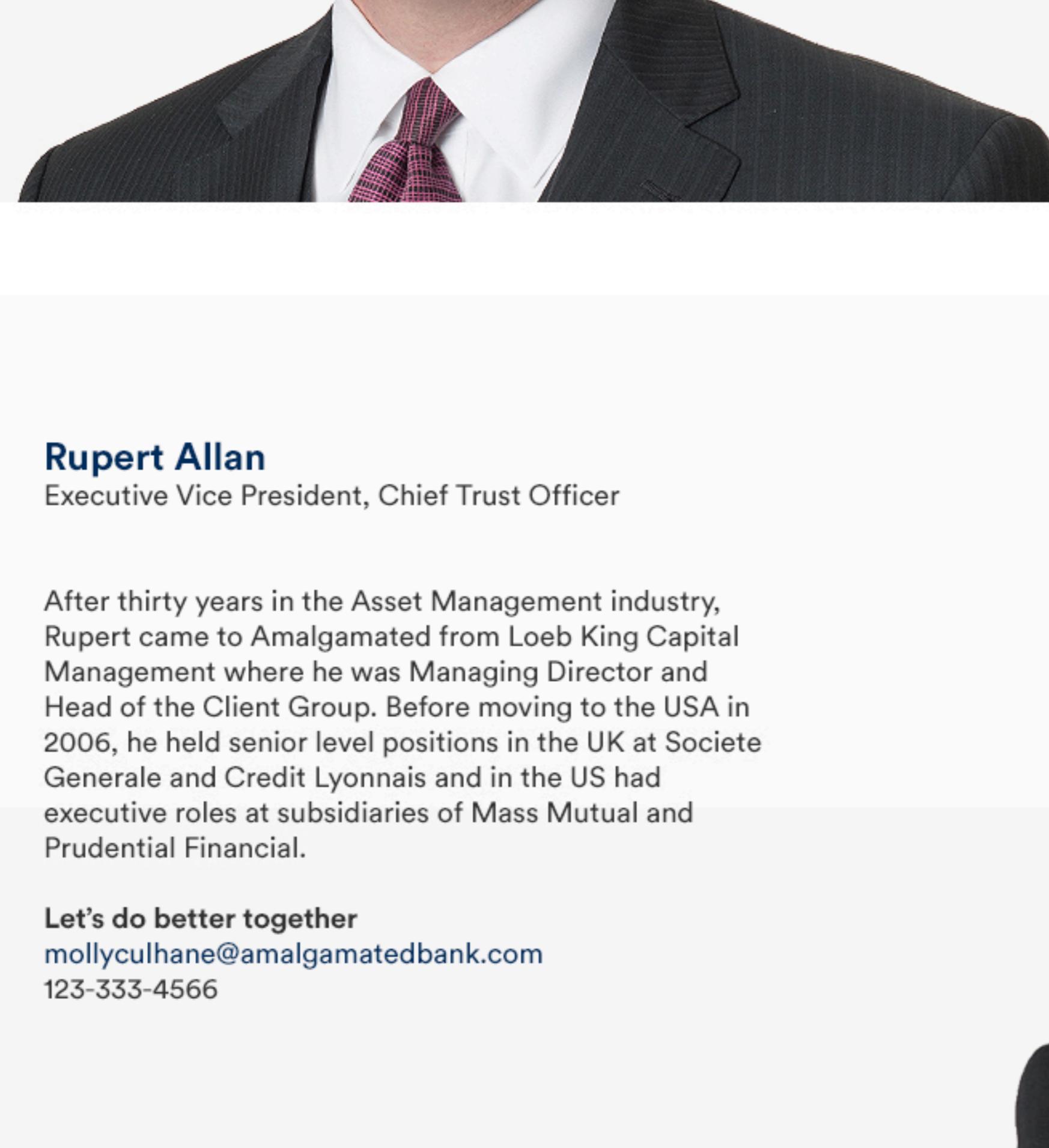
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## Executive Team

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### Keith Mestrich

President & CEO

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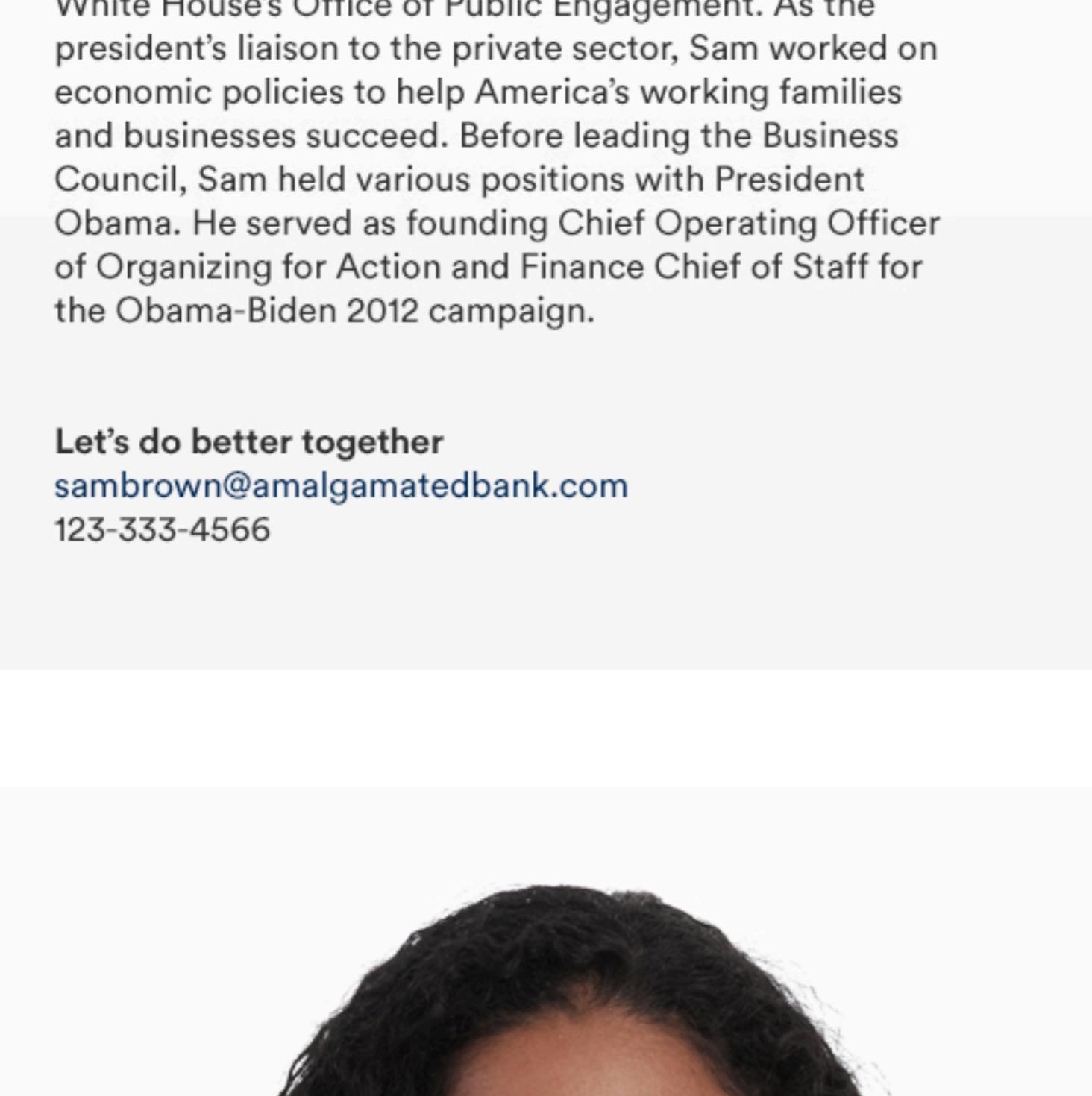
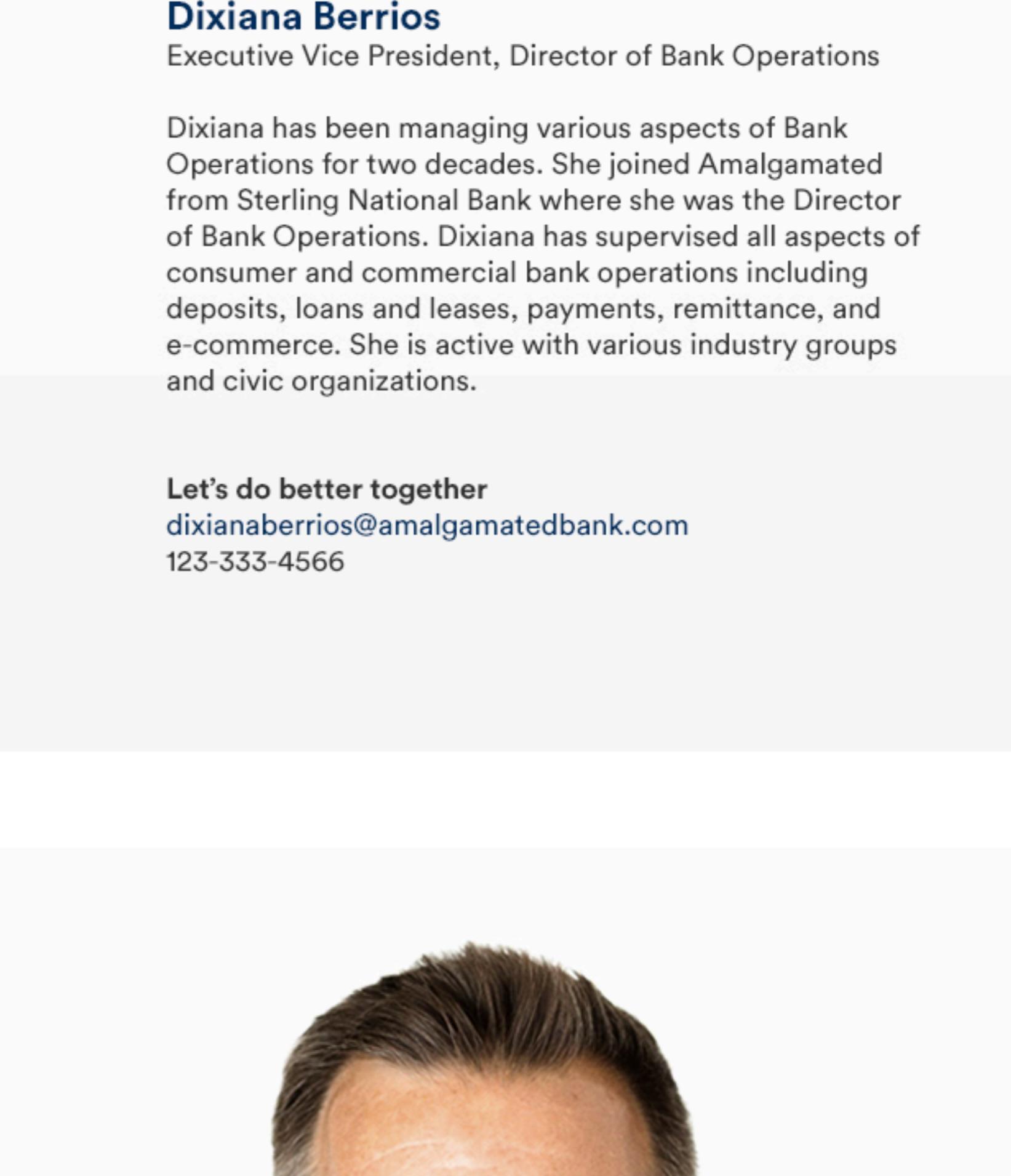
[Read more about Keith Mestrich >](#)

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[mollyculhane@amalgamatedbank.com](mailto:mollyculhane@amalgamatedbank.com)  
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**Rupert Allan**  
Executive Vice President, Chief Trust Officer

After thirty years in the Asset Management industry, Rupert came to Amalgamated from Loeb King Capital Management where he was Managing Director and Head of the Client Group. Before moving to the USA in 2006, he held senior level positions in the UK at Societe Generale and Credit Lyonnais and in the US had executive roles at subsidiaries of Mass Mutual and Prudential Financial.

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**Dixiana Berrios**  
Executive Vice President, Director of Bank Operations

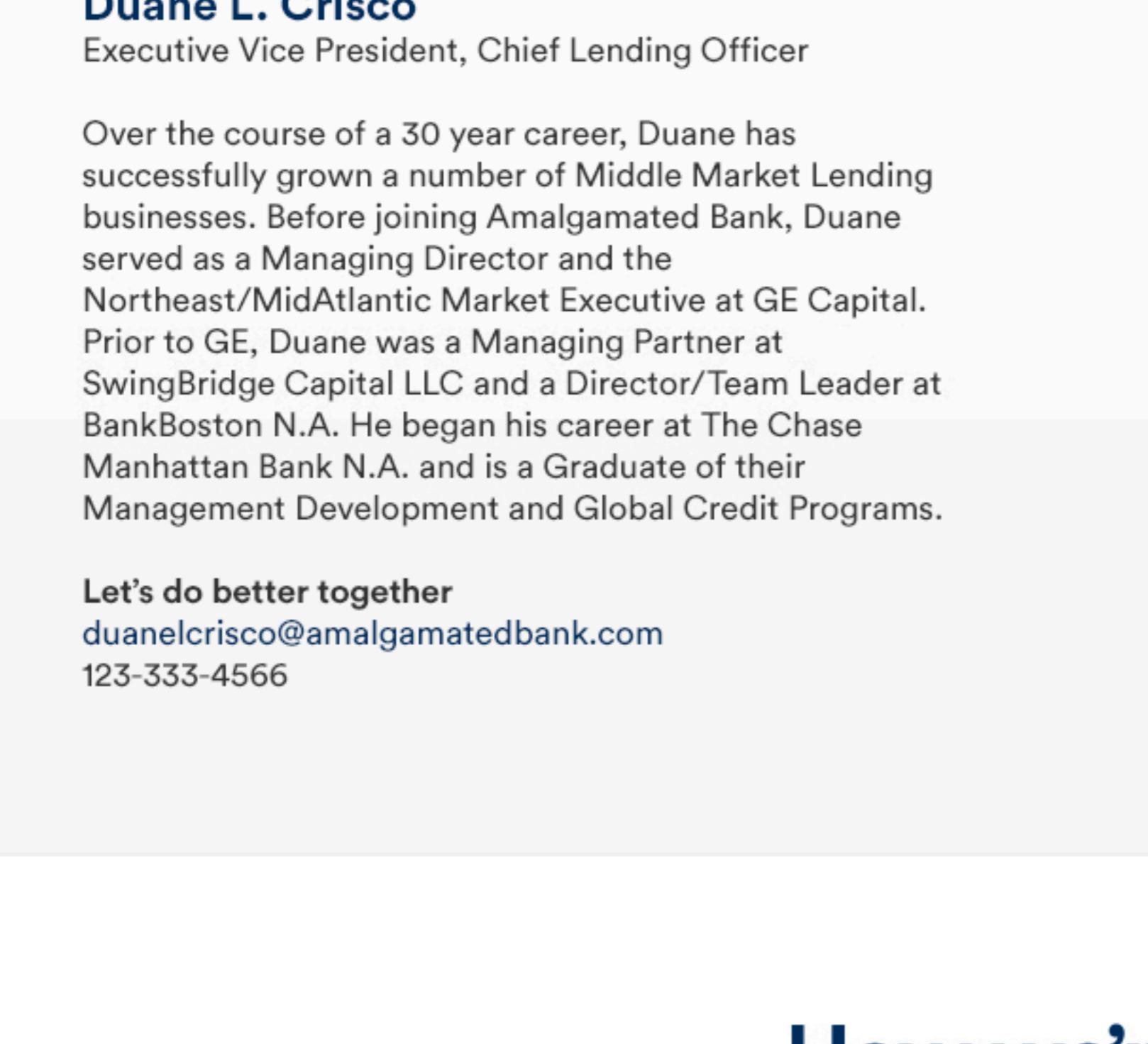
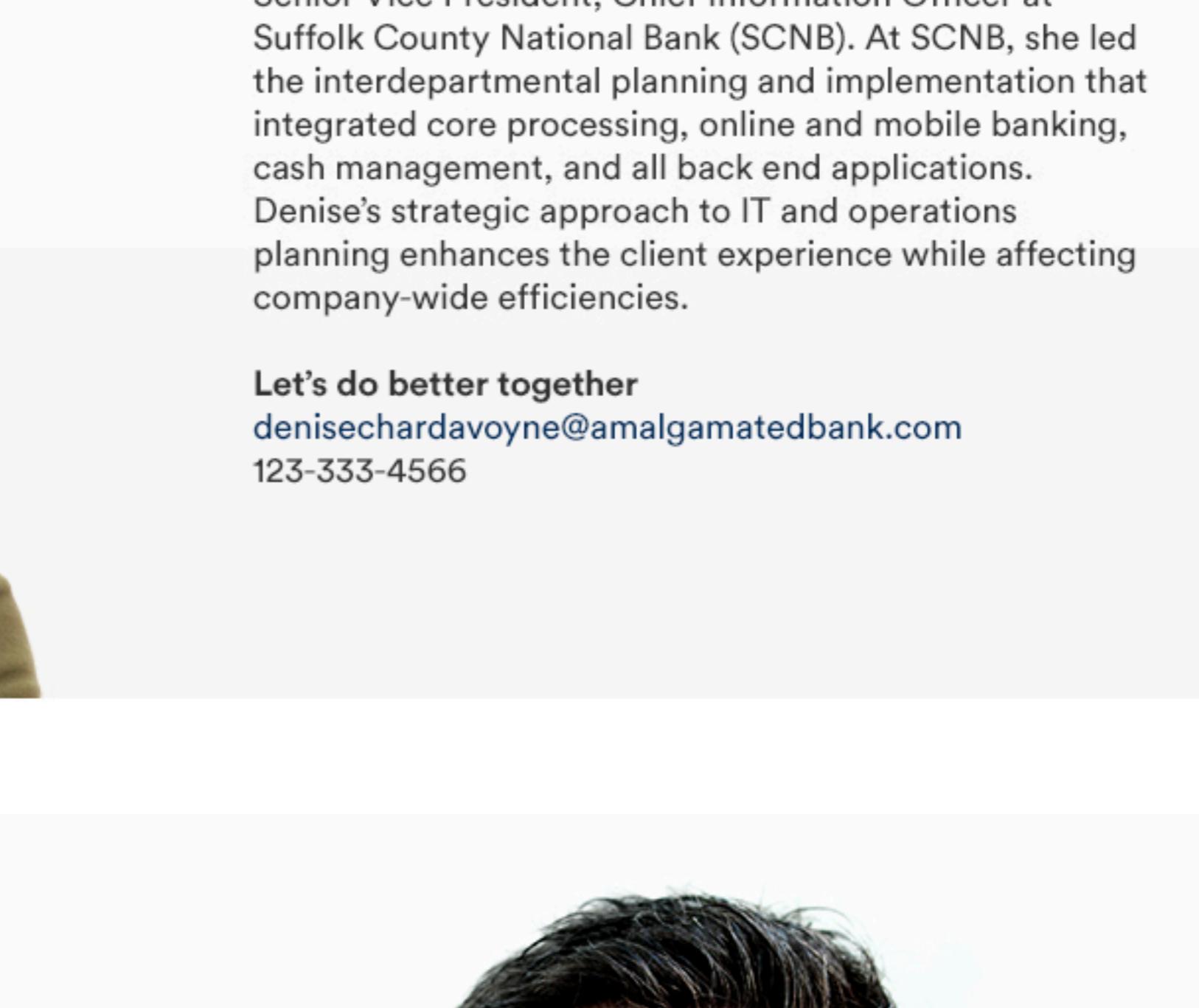
Dixiana has been managing various aspects of Bank Operations for two decades. She joined Amalgamated from Sterling National Bank where she was the Director of Bank Operations. Dixiana has supervised all aspects of consumer and commercial bank operations including deposits, loans and leases, payments, remittance, and e-commerce. She is active with various industry groups and civic organizations.

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**Sam Brown**  
Executive Vice President, Business Development

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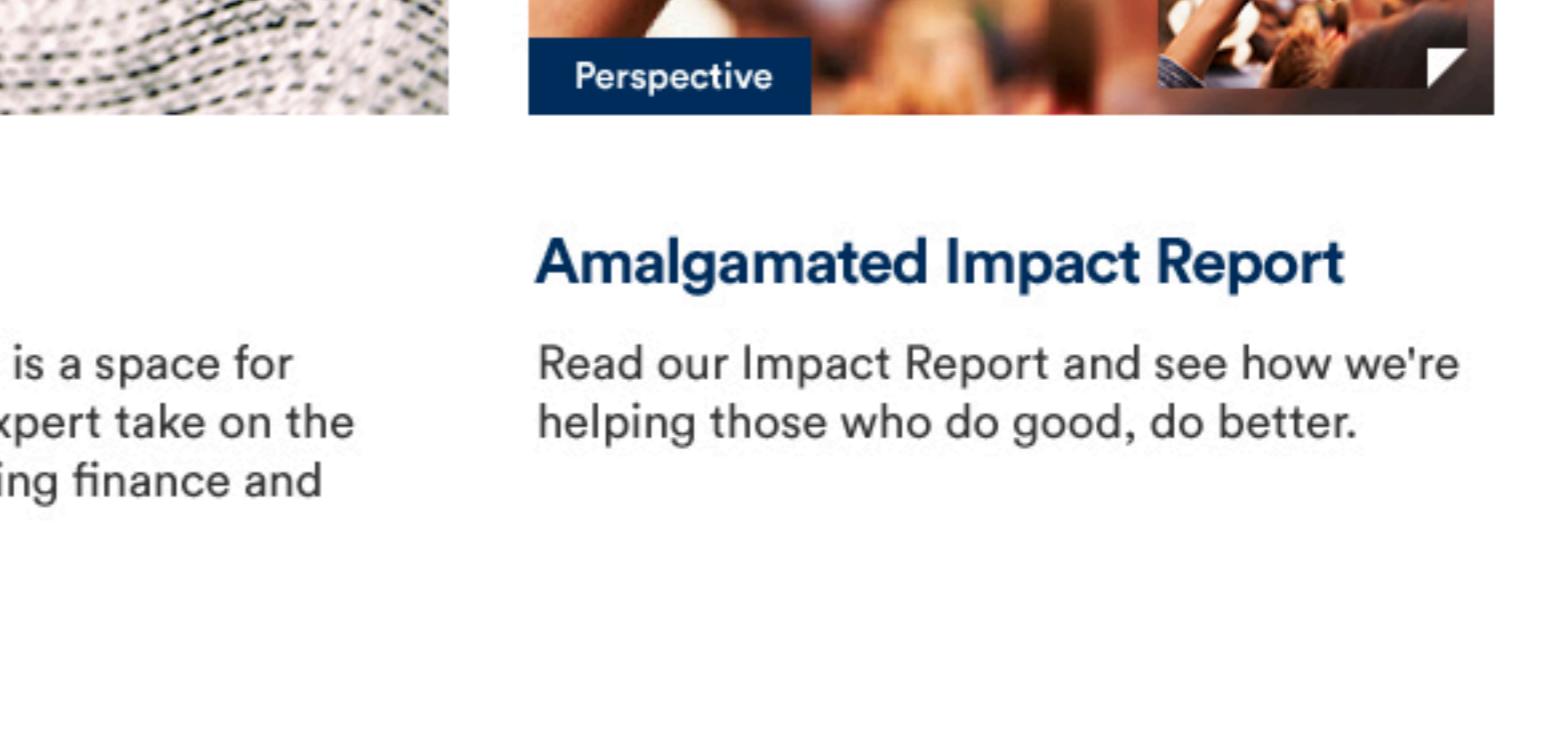


**Denise Chardavoyne**  
Executive Vice President, Chief Information Officer

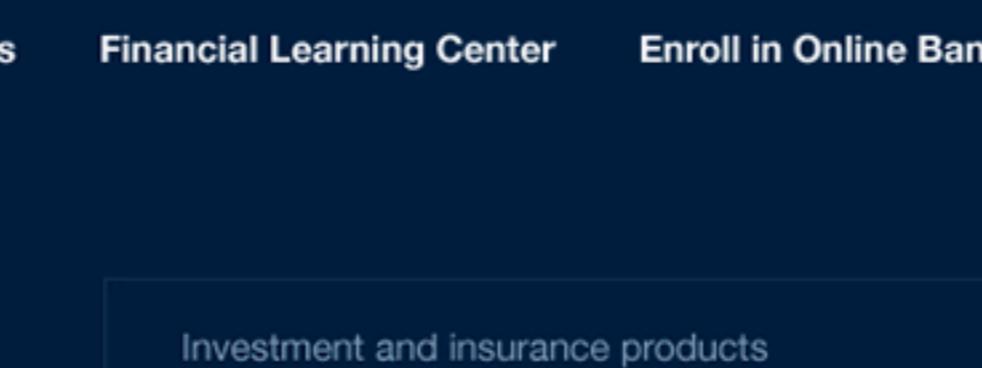
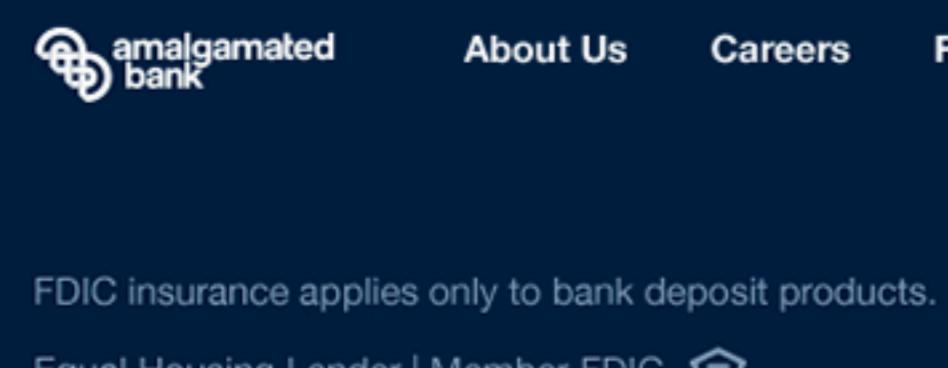
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Denise's strategic approach to IT and operations planning enhances the client experience while affecting company-wide efficiencies.

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# Executive Team

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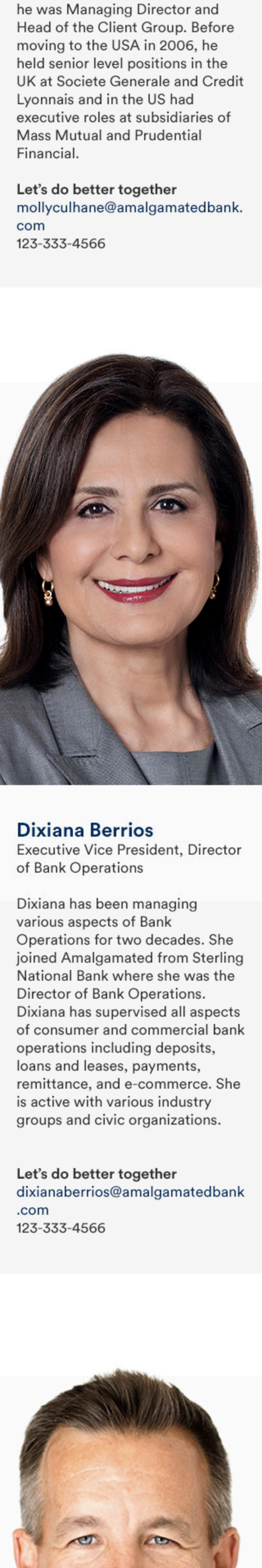
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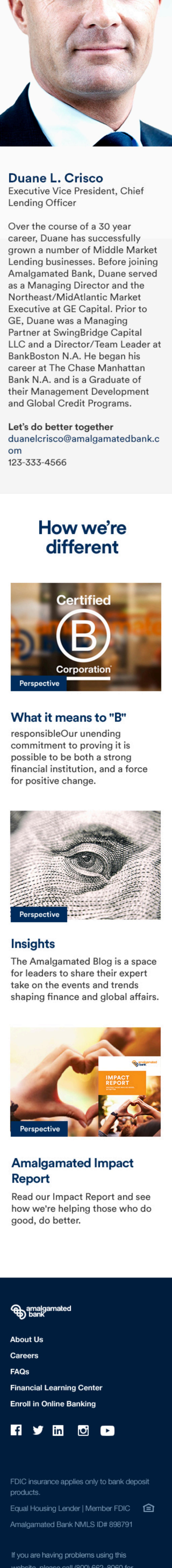
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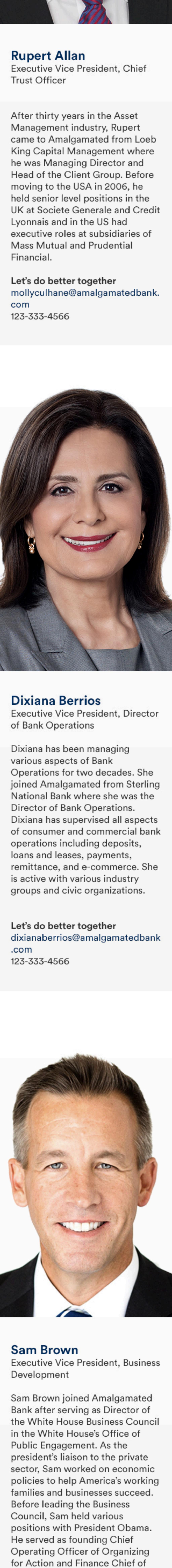
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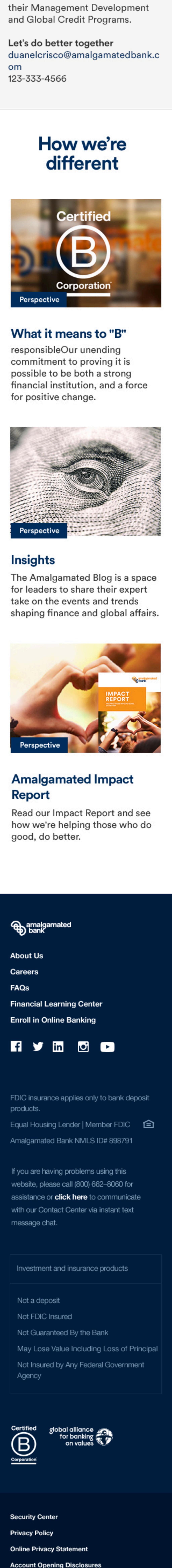
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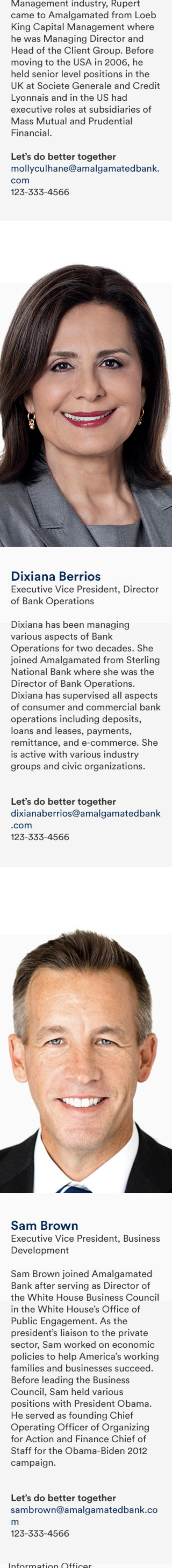
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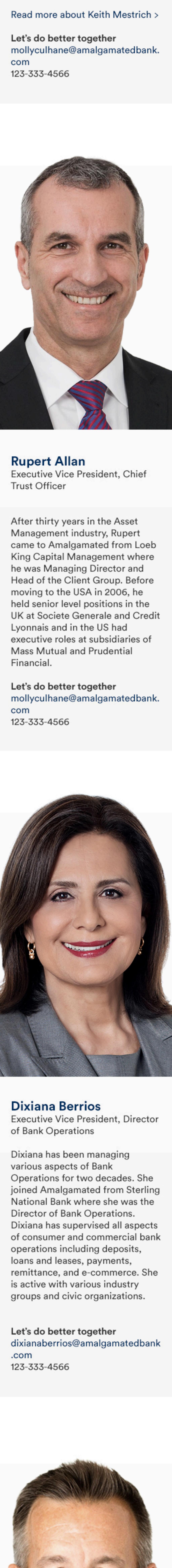
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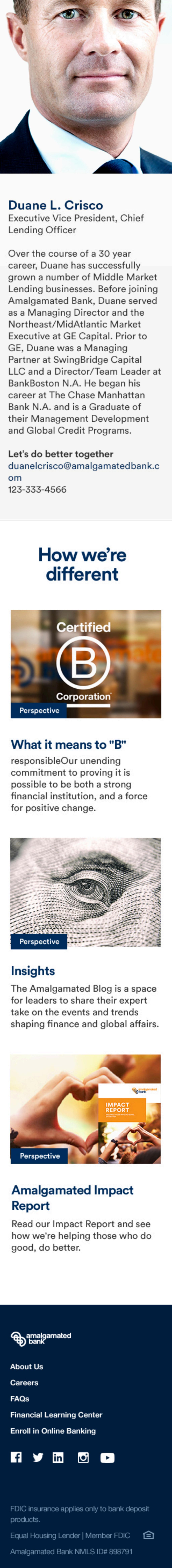
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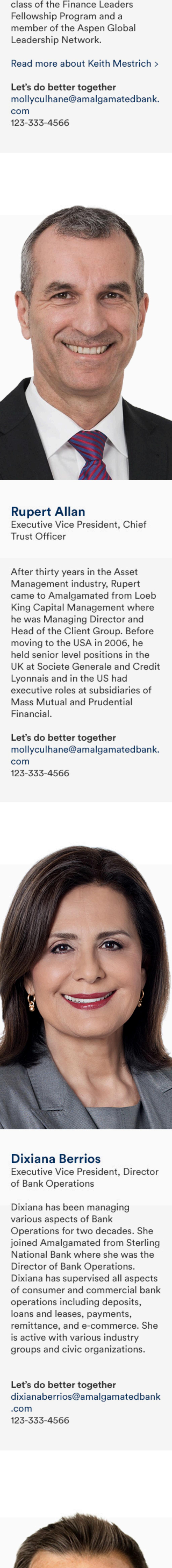
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Over the course of a 30 year career, Duane has successfully grown a number of Middle Market Lending businesses. Before joining Amalgamated Bank, Duane served as a Managing Director and Head of the Client Group at GE Capital. Prior to GE, Duane was a Managing Partner at SwingBridge Capital LLC and a Director/Team Leader at BankBoston N.A. He began his career at The Chase Manhattan Bank N.A. and is a Graduate of their Management Development and Global Credit Programs.

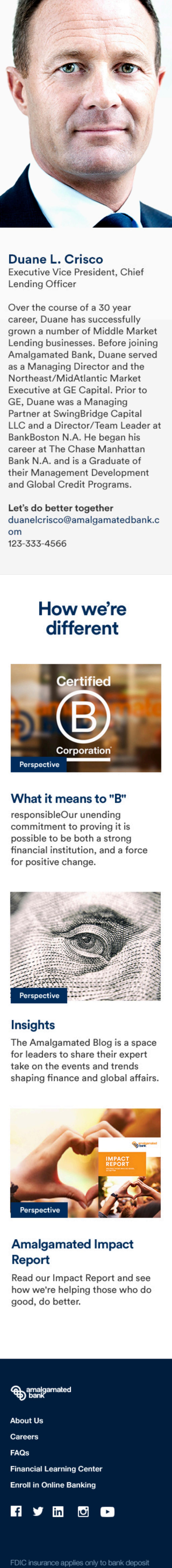
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**Sam Brown**  
Executive Vice President, Business Development

Sam Brown joined Amalgamated Bank after serving as Director of the White House Business Council in the White House's Office of Public Engagement. As the president's liaison to the private sector, Sam worked on economic policies to help America's working families and businesses succeed. Before leading the Business Council, Sam held various positions with President Obama. He served as founding Chief Operating Officer of Organizing for Action and Finance Chief of Staff for the Obama-Biden 2012 campaign.

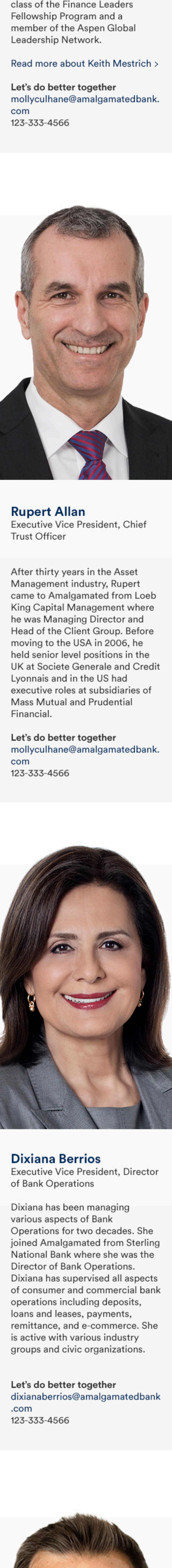
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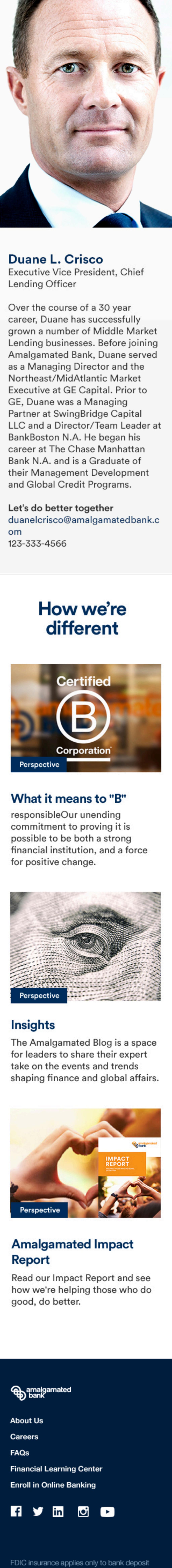
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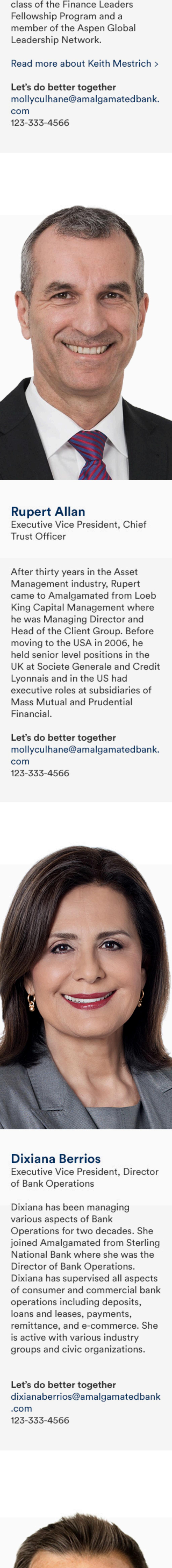
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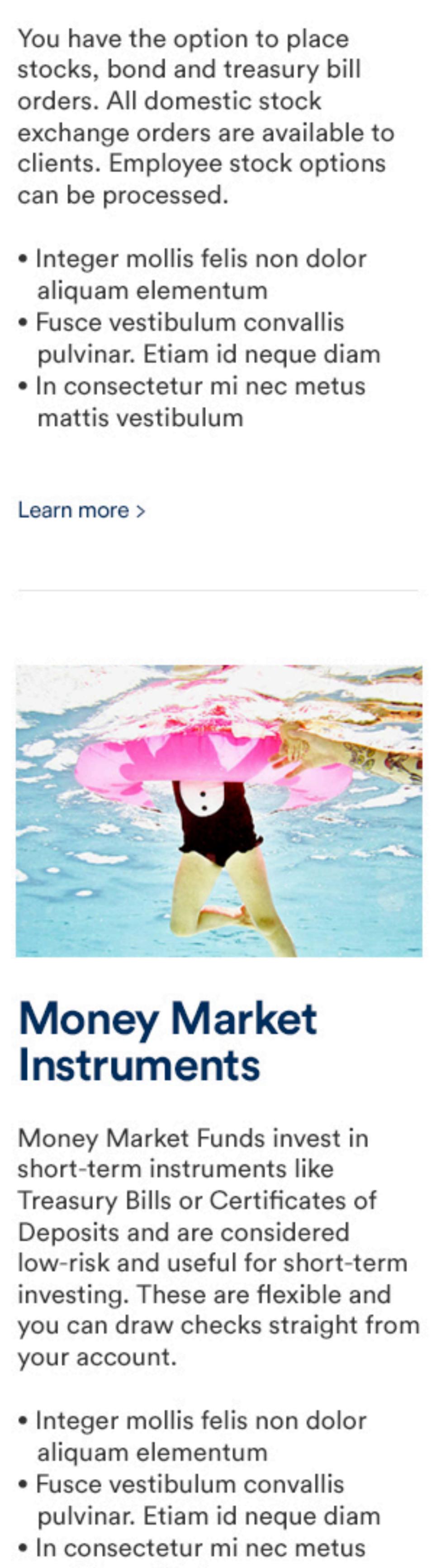


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Your investment representative will provide access to some of the industry's most recognized mutual funds.

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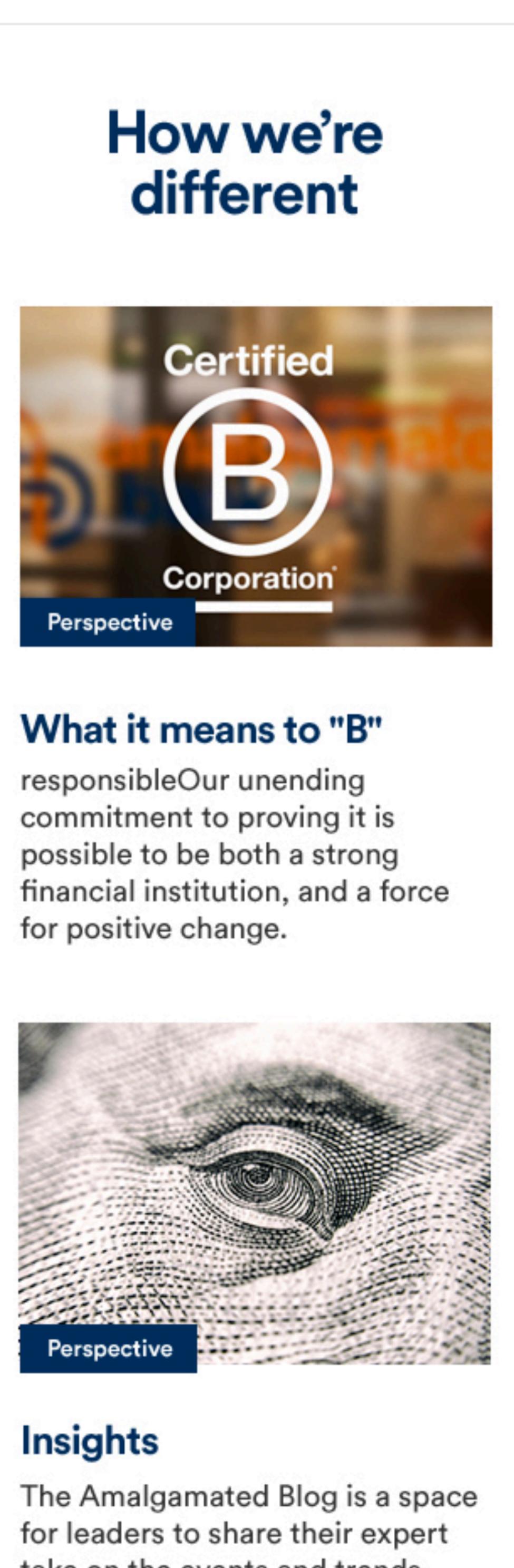


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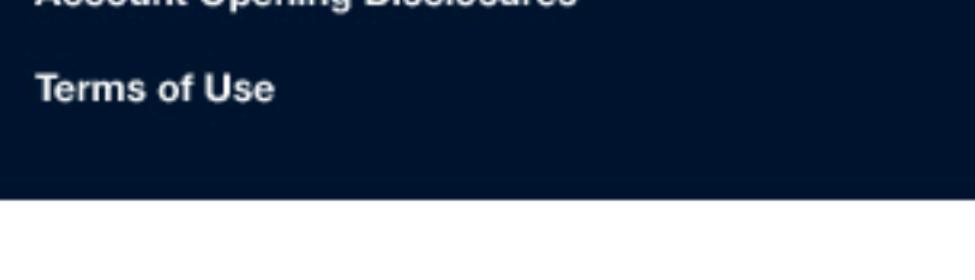
## Annuities

Sometimes described as life insurance for the living, an annuity is an investment you make, either in a lump sum or in payments, that then gives you regular disbursements over a period of time.

Various annuities are available, including:

- Tax Sheltered Annuities: a tax qualified plan offered to employees of non-profit organizations and employees of public school systems.
- Variable Annuity: this tax-deferred annuity allows you to take advantage of competitive interest rates through market exposure
- Fixed Annuity: this tax-deferred annuity allows you to safely take advantage of competitive fixed interest rates

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## Insurance

Provide financial protection for your family or business. Choose between term, whole life, wealth transfer, and long-term care insurance.

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## Retirement plans (retirement income planning)

Choose from a variety of IRAs - Simple, ROTH, Traditional, rollovers, transfers and SEP (Simplified Employee Pension Plans).

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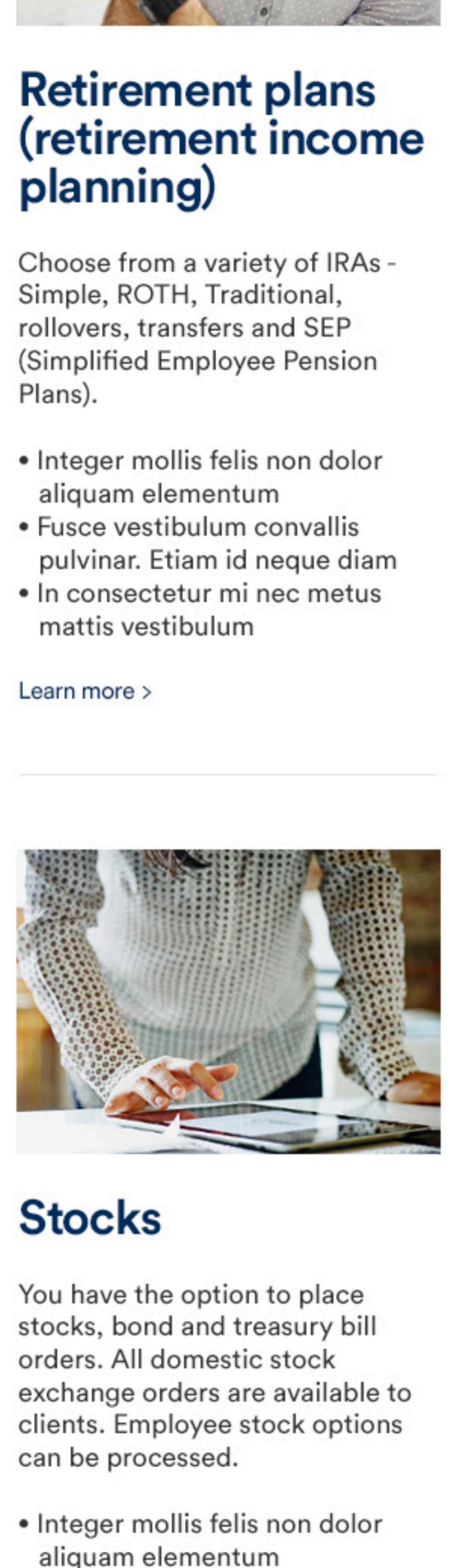


## Stocks

You have the option to place stocks, bond and treasury bill orders. All domestic stock exchange orders are available to clients. Employee stock options can be processed.

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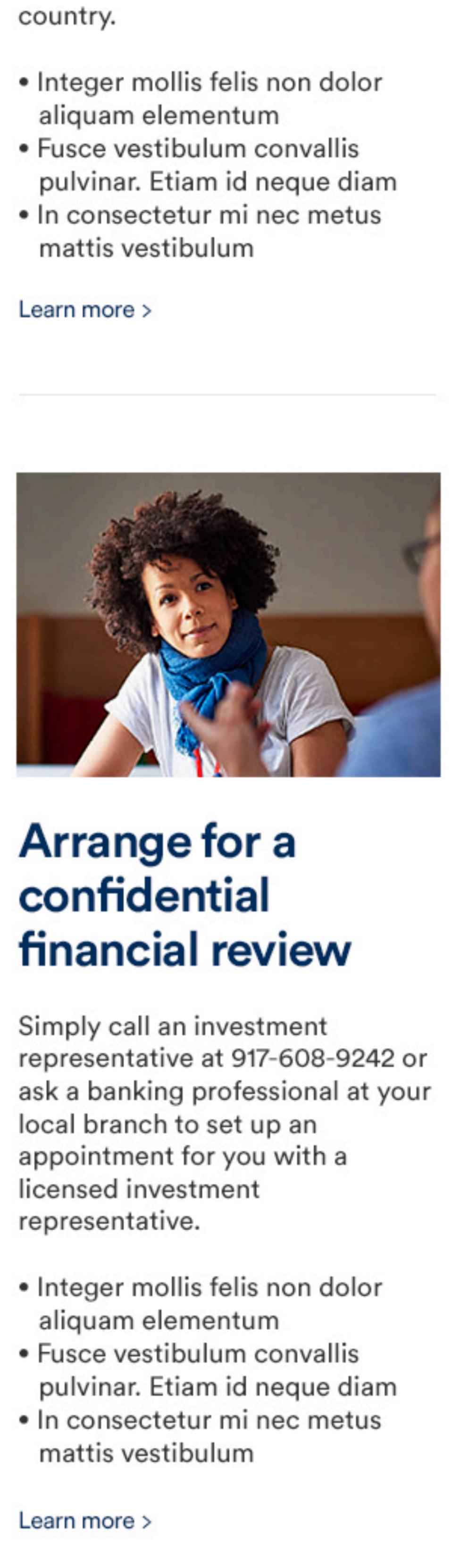


## Money Market Instruments

Money Market Funds invest in short-term instruments like Treasury Bills or Certificates of Deposits and are considered low-risk and useful for short-term investing. These are flexible and you can draw checks straight from your account.

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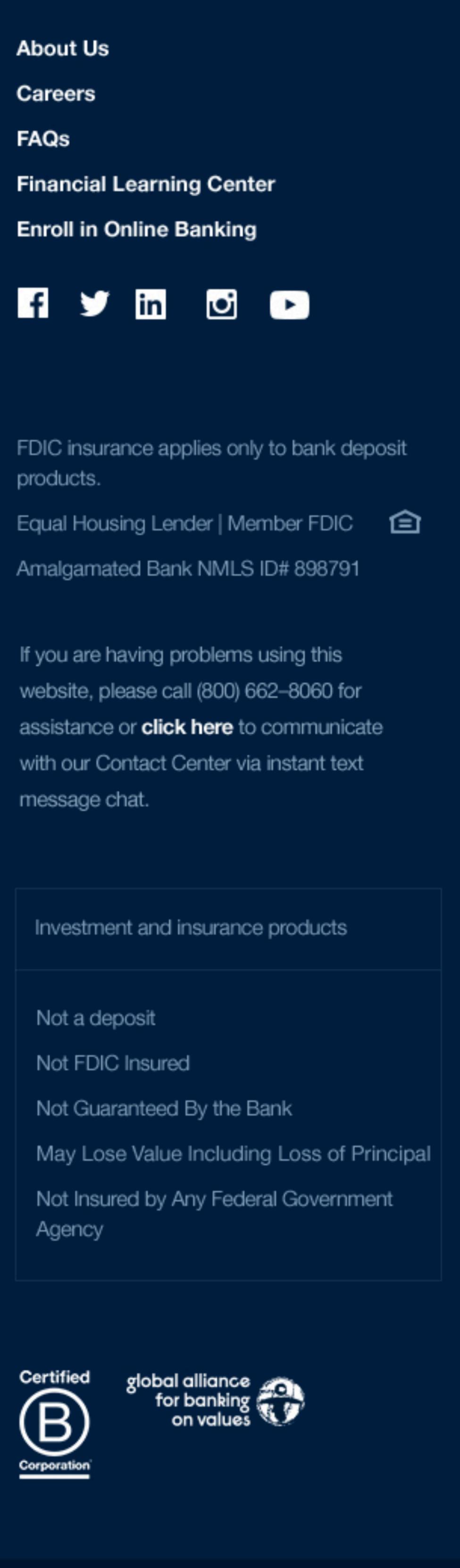


## Bonds

Choose from a broad range of bonds to meet your income needs, including Treasuries, Federal Agencies, corporate, municipal, and mortgage backed.

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## College savings plans

Start saving to pay tuition, fees, room and board, books and required supplies at accredited colleges, universities and vocational schools across the country.

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## Arrange for a confidential financial review

Simply call an investment representative at 917-608-9242 or ask a banking professional at your local branch to set up an appointment for you with a licensed investment representative.

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## How we're different

Certified B Corporation Perspective

Responsible Our unending commitment to proving it is possible to be both a strong financial institution, and a force for positive change.

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## What it means to "B"

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## Insights

The Amalgamated Blog is a space for leaders to share their expert take on the events and trends shaping finance and global affairs.

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## Amalgamated Impact Report

Read our Impact Report and see how we're helping those who do good, do better.

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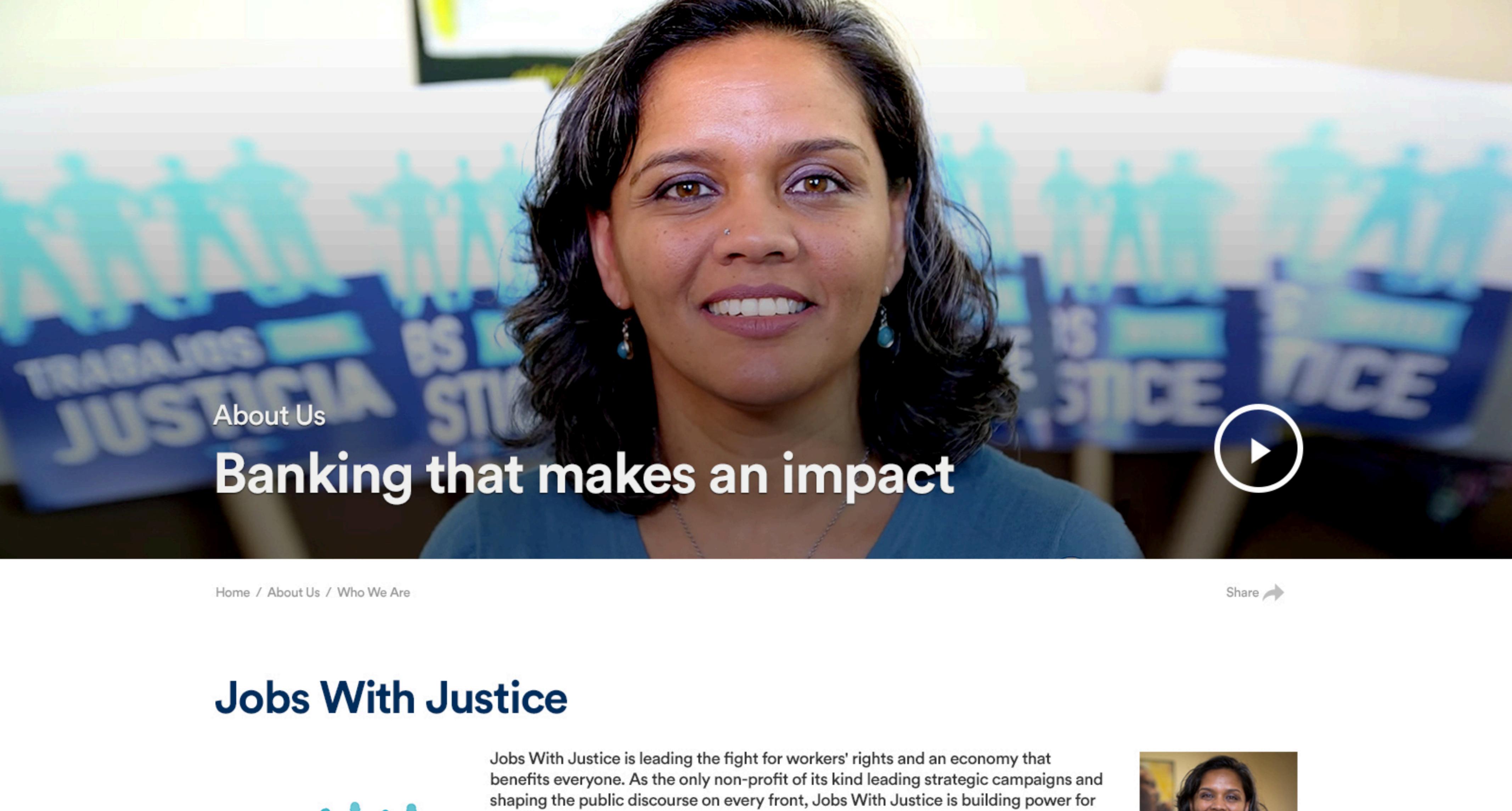
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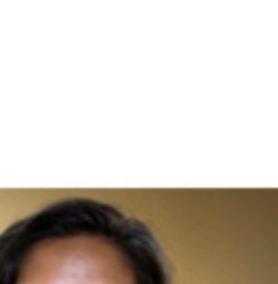


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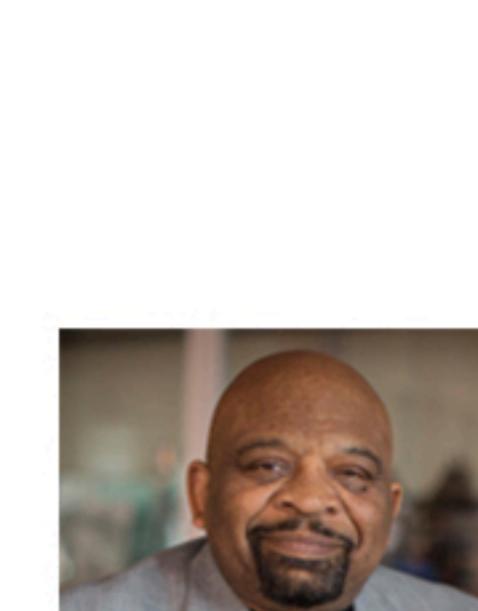
### Jobs With Justice



Jobs With Justice is leading the fight for workers' rights and an economy that benefits everyone. As the only non-profit of its kind leading strategic campaigns and shaping the public discourse on every front, Jobs With Justice is building power for working people.

Jobs With Justice believes that all workers should have collective bargaining rights, employment security and a decent standard of living within an economy that works for everyone. They are committed to working nationally and locally, on the ground and online, to win real change for workers by combining innovative communications strategies, solid research and policy advocacy with grassroots action and mobilization.

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**Sarita Gupta**

Executive Director

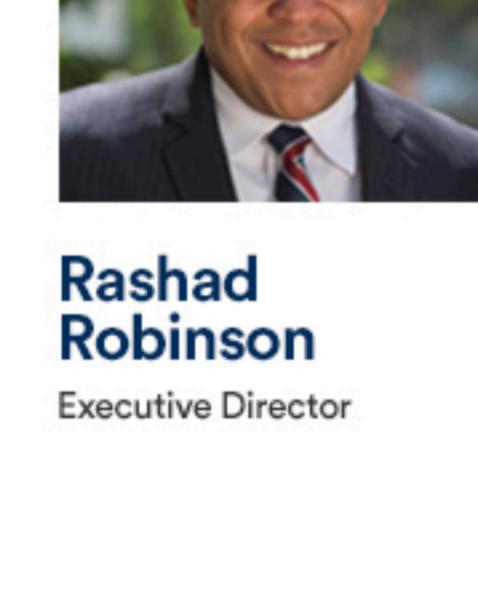
### 1199 SEIU United Healthcare Workers East



Every day, the members of 1199SEIU United Healthcare Workers East save lives, deliver babies and care for the sick, seniors and people with disabilities. Members are nurses, nurse aides, techs, lab workers, clerks, housekeepers, dietary workers, transporters, pharmacists, social workers and many other types of medical professionals. They are the frontline caregivers in hospitals, nursing homes, homecare facilities, clinics, pharmacies and all other areas of the healthcare industry.

With over 400,000 members throughout Massachusetts, New York, New Jersey, Washington, D.C. and Florida, 1199SEIU is the largest and fastest-growing healthcare union in the nation.

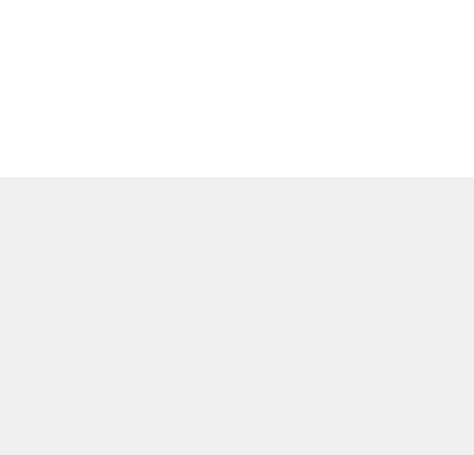
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**George Gresham**

President

### Color of Change



Color Of Change is building new, effective strategies for helping people respond effectively to injustice in the world around us. As a national online force driven by over one million members, Color Of Change moves decision-makers in corporations and government to create a more human and less hostile world for Black people in America.

With a focus on campaigns and initiatives that win change and strategies powerful enough to fight racism and injustice—in politics, culture, the workplace, the economy, the criminal justice system and community life—Color Of Change aims to advance society, mobilize members to end practices and systems that unfairly hold Black people back, and champion solutions that move us all forward.

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**Rashad Robinson**

Executive Director

### Eleanor's Legacy



Eleanor's Legacy is building a new generation of pro-choice Democratic women candidates, informed voters, and political activists throughout New York State. Their mission is inspired by the dynamic legacy of Eleanor Roosevelt, one of the most influential figures of the 20th century. Eleanor Roosevelt dedicated her life to expanding the role of women in politics and government. As she famously said, "Democracy is not about words, but action."

Eleanor's Legacy takes action to increase women's participation in New York Democratic politics by raising funds to elect women to state and local offices, providing political training and leadership development, and establishing a growing statewide network of women community leaders, elected officials, and grassroots activists.

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**Brette McSweeney**

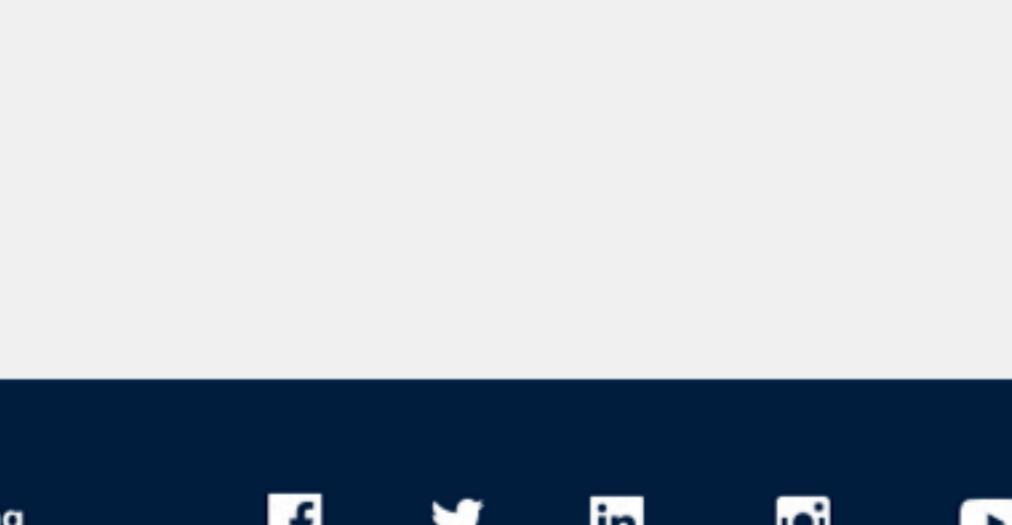
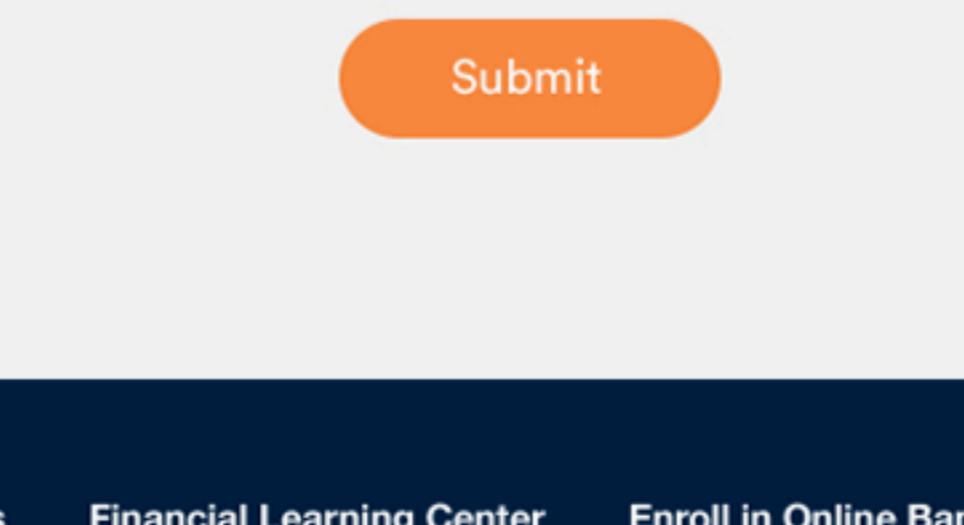
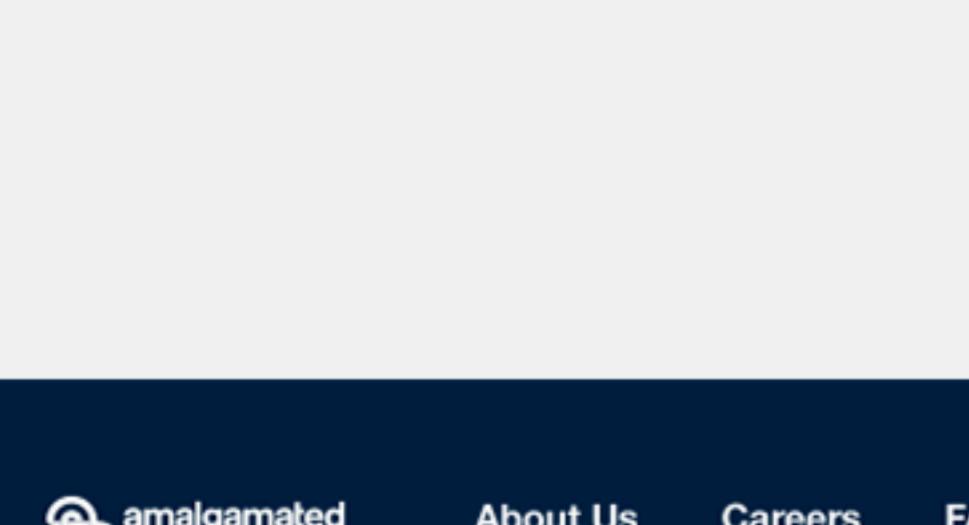
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### We help over 100+ Non-profits



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### How we're different



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#### Corporate Responsibility

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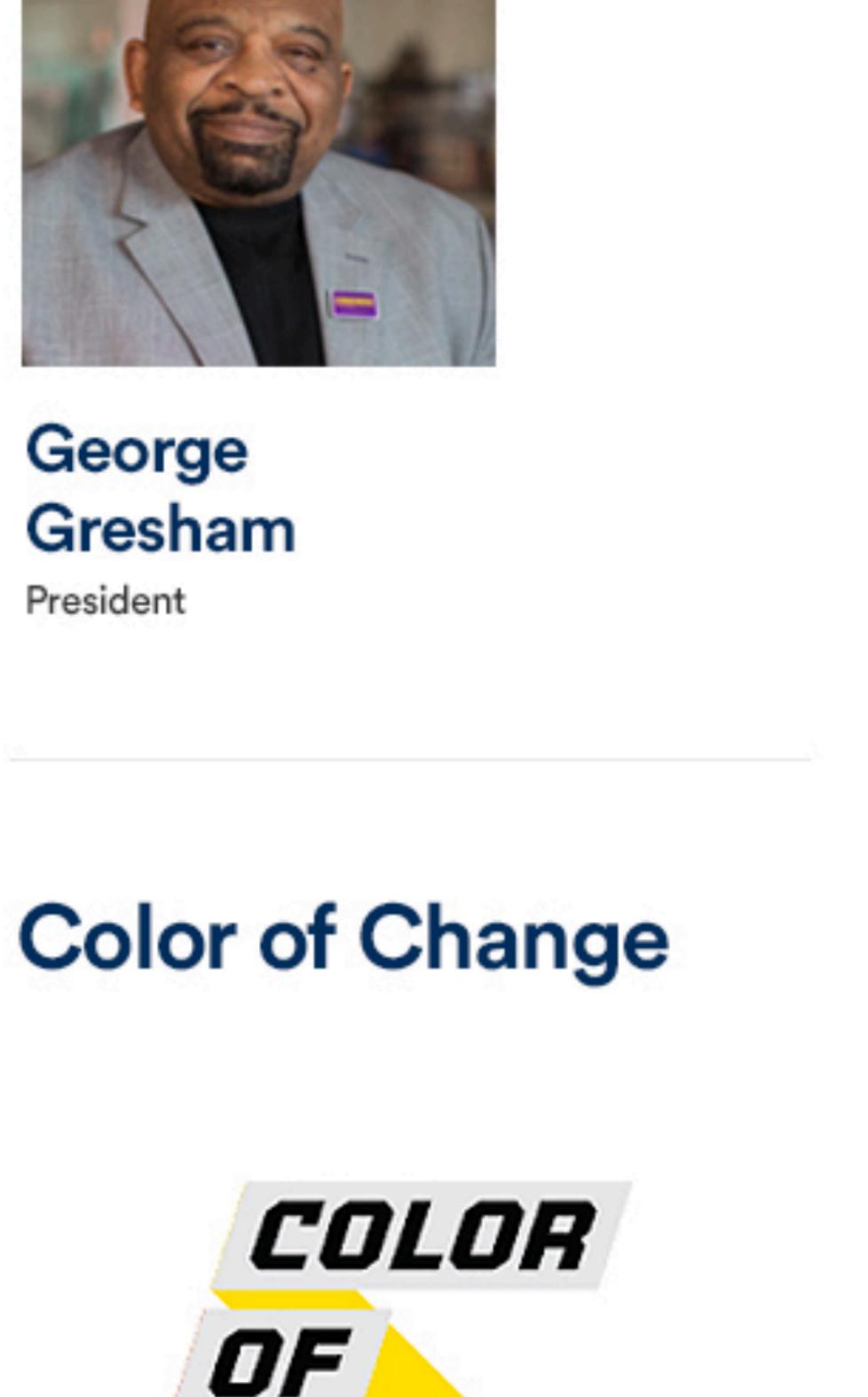
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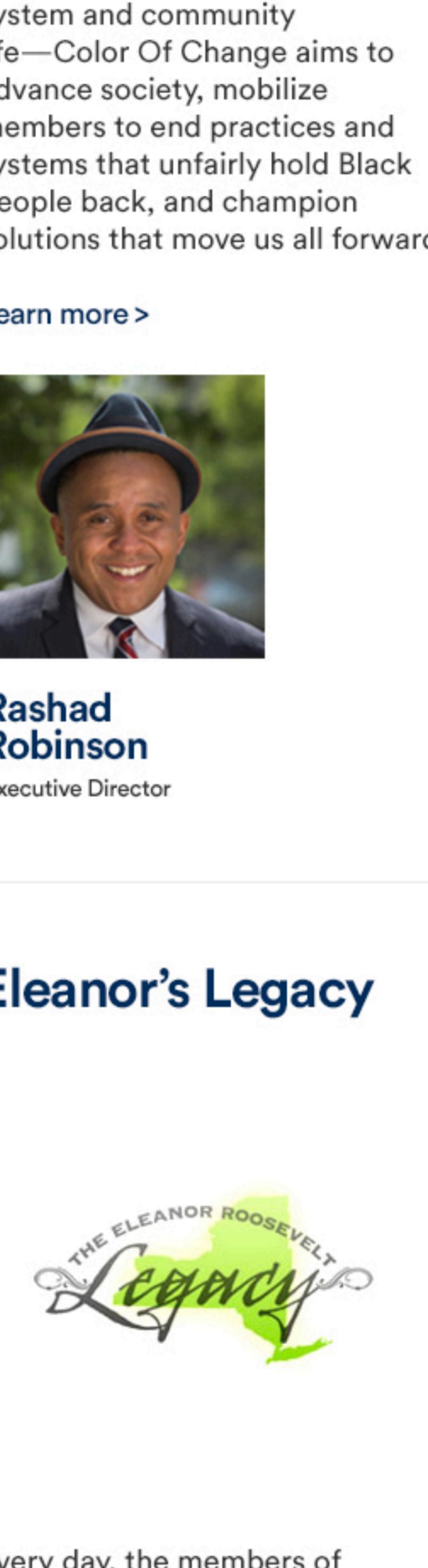
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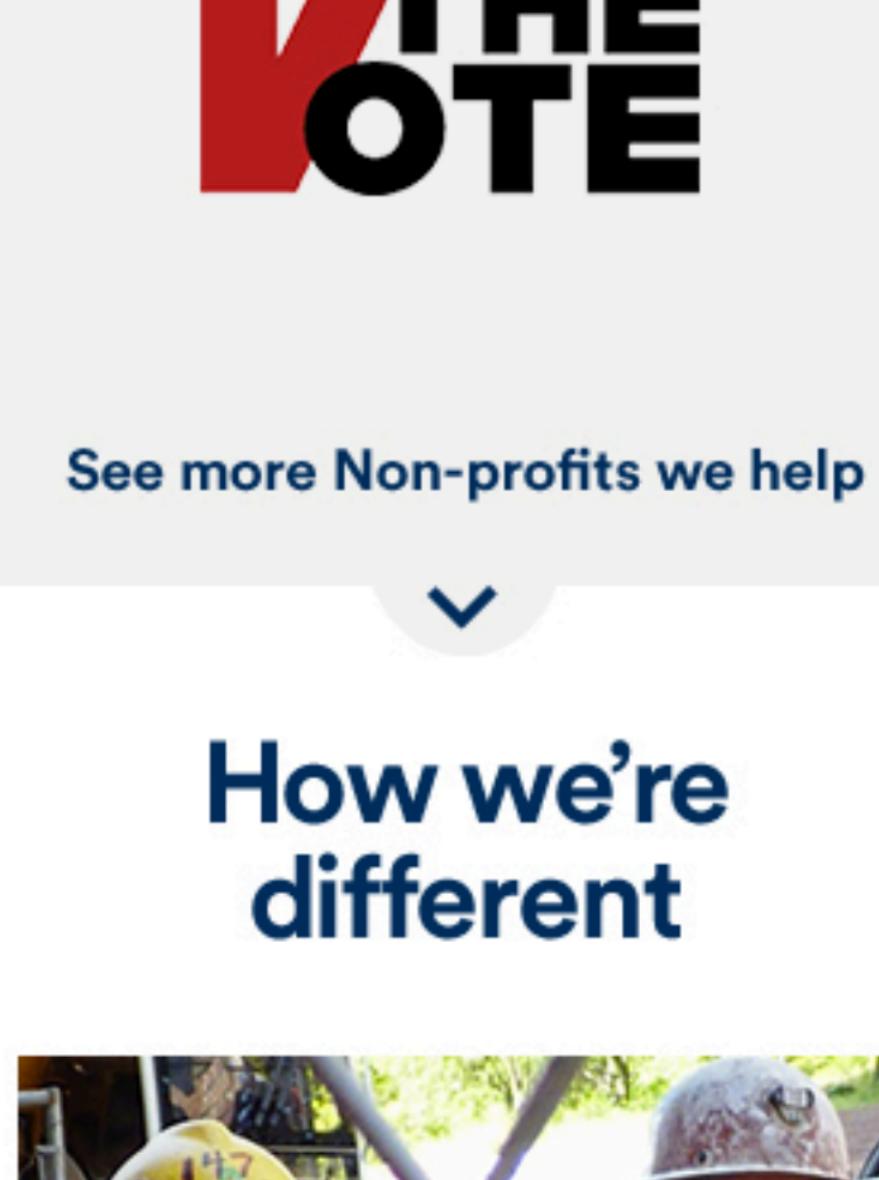
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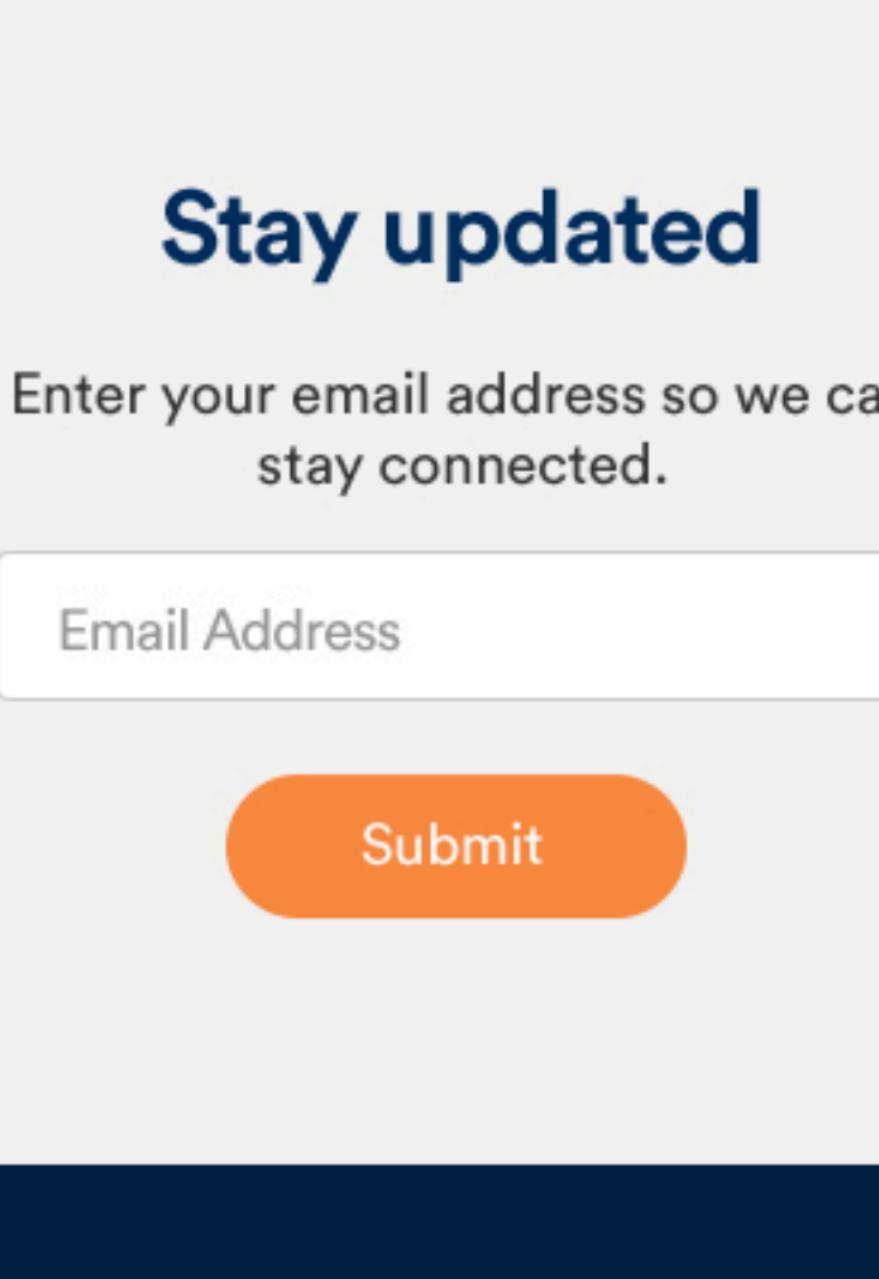
**Sarita Gupta**  
Executive Director



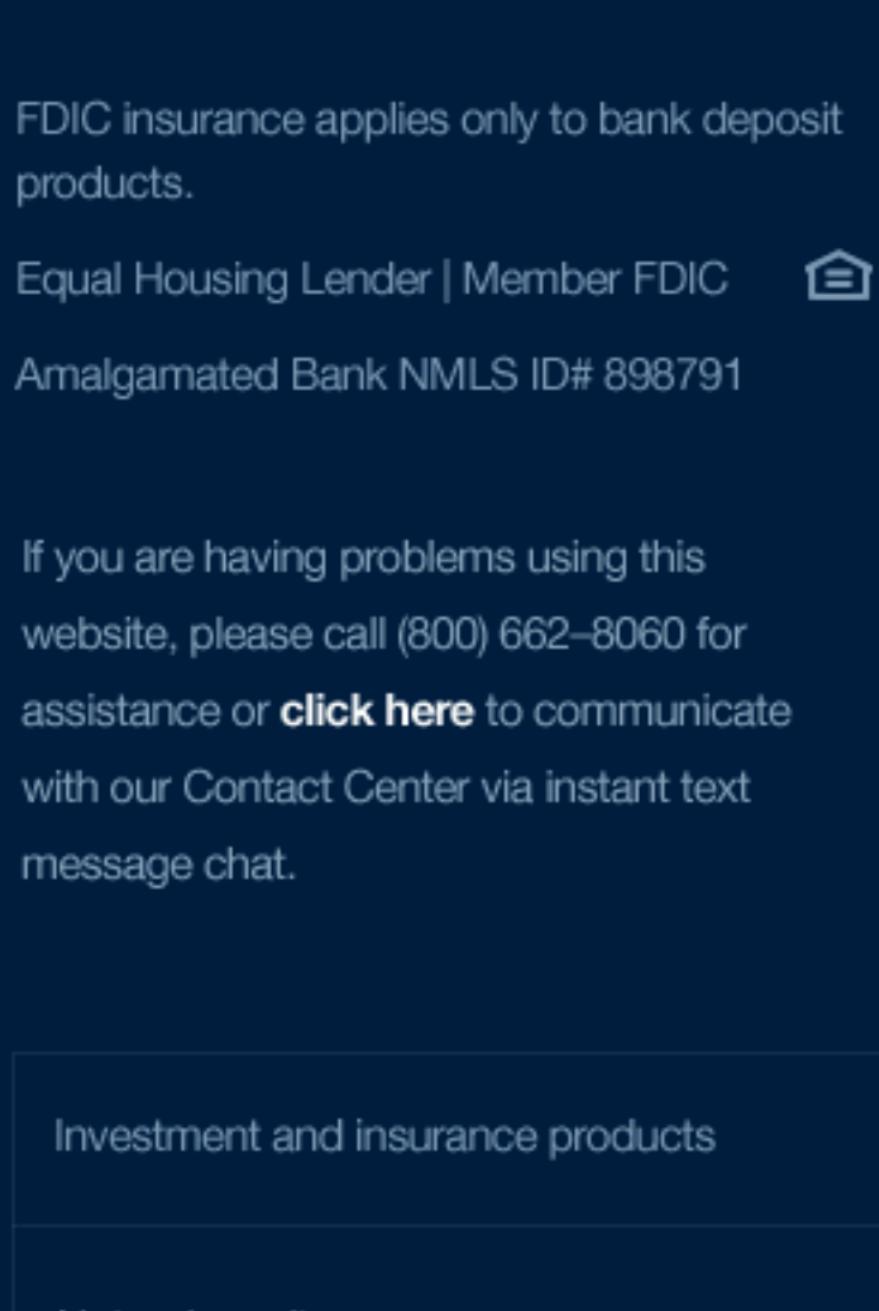
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**Brette McSweeney**  
Executive Director



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Not Guaranteed By the Bank

May Lose Value Including Loss of Principal

Not Insured by Any Federal Government Agency

Investment and insurance products

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