

PERFORMANCE TRUST CAPITAL PARTNERS

Institutional Sales & Trading: Your Partner in Execution

As a leading partner for banks, insurance companies, hedge funds, and asset managers, Performance Trust provides product expertise and exceptional execution across all fixed income asset classes. With access to over 500 institutional investors plus unique partnerships with community banks & credit unions, our partners can be confident that Performance Trust will provide extraordinary service.



**\$125+ BILLION IN SECURITIES
TRADED ANNUALLY
ON THREE YEAR AVERAGE**

• *The Institutional Group was able to source over 25B of securities from community banks & credit unions*



**50 TEAM MEMBERS BETWEEN
SALES AND TRADING**



**500+ INSTITUTIONAL
INVESTOR CLIENTS**

PERFORMANCE TRUST SERVICES

Balance Sheet Strategy— Community Banks & Credit Unions

- Integral to our firm's mission, our partnership with community banks & credit unions drive us to uncover creative & unique solutions in the fixed income marketplace
- 100+ professionals dedicated to helping you achieve results that surpass those you would otherwise attain
- Deliver a comprehensive total return based decision making framework

Capital Markets— New Issue Securitization & Financing

- Leader in unique and first time securitizations, custom funding solutions, creative structuring and capital raises
- Experienced institutional salesforce covering the entire spectrum of investors, as well as extensive down-stream distribution to community financial institutions

Investment Banking— M&A and Debt Issuance

- Buy-side and sell-side M&A, fairness opinions, private placements, equities offerings, sub debt offerings, valuation, and strategic advisory services
- Seasoned professionals with 160+ years of combined financial services industry experience

Contact Us

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CAPITAL PARTNERS

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