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NAVIGANT CREDIT UNION EXPANDS WEALTH MANAGEMENT SERVICES THROUGH INTEGRATION OF RANDALL FINANCIAL GROUP

SMITHFIELD, R.I. – (Sept. 1, 2025) – Navigant Credit Union announced today it is enhancing its financial planning and investment management services by acquiring Randall Financial Group, LLC d/b/a NCU Investment Solutions through its wholly-owned subsidiary, NCU Holding Company, LLC, as its wealth management partner.

With this acquisition, Navigant Credit Union will sunset its existing NCU Wealth Management division effective Sept. 1 and launch **NCU Investment Solutions**. NCU Investment Solutions is a multi-faceted financial advisory program focused on fiduciary, advice driven relationships seeking to align with Navigant’s mission to improve the financial well-being of the families, businesses and communities they serve. This evolution reflects a broader commitment to delivering tailored, high-quality financial guidance to members.

This new business line will be led by the founder of Randall Financial Group, **Oliver Tutt, CFP**, who will now serve as NCU Investment Solutions’ SVP, Director of Wealth Management and Financial Planning. A certified financial planner with more than three decades of industry experience, Tutt will work closely with the team of financial advisors to develop a comprehensive strategy that introduces members to NCU Investment Solutions’ enhanced programs and services.

“We are pleased to welcome Oliver to our growing Navigant Credit Union team. His proven track record of success and inherent passion for helping families improve their financial situations will be an asset to our members across the communities we serve,” said Navigant Credit Union President / CEO Kathy Orovitz. “The launch of NCU Investment Solutions will give us a stronger framework to deliver the wealth management services our members need to successfully plan for their futures.”

The acquisition of Randall Financial Group officially closed in early 2025. Existing or prospective Navigant Credit Union members who have questions about available financial planning and investment management services can call the NCU Investment Solutions team at (401) 233-4337.

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About Navigant Credit Union

Based in Smithfield, R.I., Navigant Credit Union is the longest-operating member-owned credit union in Rhode Island. Since its founding in 1915, Navigant Credit Union has been dedicated to providing its members with unparalleled financial products and services while working every day to improve the financial well-being of the families, businesses, and communities it serves across Rhode Island. With more than \$4 billion in assets, more than 165,000 members and 25 physical branch locations, Navigant Credit Union is the oldest and largest credit union in Rhode Island and among the state’s strongest and most trusted financial institutions.

Earning a five-star rating in two consecutive years, Navigant Credit Union is recognized by *Newsweek* as one of America’s best regional banks and credit unions. Navigant Credit Union is consistently ranked Rhode Island’s top credit union by *Forbes*; among Rhode Island’s Best Places to Work by *Providence Business News* and as a top mortgage lender by the *Providence Journal*. Navigant Credit Union is federally insured by the NCUA. Products and services

provided by Randall Financial Group d/b/a NCU Investment Solutions are not insured or guaranteed by the NCUA, Navigant Credit Union, or any other government agency.

Visit www.navigantcu.org to learn more.

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