

Spring 2020

BUYERS' GUIDE

Insightful resources.

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- Connect with peers who share your concerns and interests
- Stay current with trends and topics impacting your credit union and your work
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- Proactively expand your network of credit union professionals and grow in your career
- Find new energy and enthusiasm for your role

➤ Join at cunacouncils.org/membership

CUNA Schools & Conferences

BOARD & COMMITTEE

CUNA Credit Union Board of Directors Conference

January 19-22, 2020 // San Jose del Cabo, Mexico

CUNA Credit Union Board Certification School

May 4-8, 2020 // New Orleans, LA

CUNA Strategic Planning Roundtable

August 17-18, 2020 // Nashville, TN

CUNA Roundtable for Board Leadership

September 25-26, 2020 // Toronto, Canada

CUNA Credit Union Board Development School

2020 dates & location to be announced

CUNA Supervisory Committee & Internal Audit Conference

2020 dates & location to be announced

COMPLIANCE

CUNA & ACUIA Internal Audit Certification School

March 9-12, 2020 // Tempe, AZ

Fall 2020 dates & location to be announced

CUNA Regulatory Compliance Certification School*

April 20-24, 2020 // Clearwater Beach, FL

September 13-18, 2020 // Phoenix, AZ

CUNA Attorney's Conference

October 26-28, 2020 // Jackson Hole, WY

CUNA BSA/AML Certification Conference with NASCUS*

November 9-12, 2020 // Fort Lauderdale, FL

FINANCE & ECONOMICS

CUNA Financial Management School*

April 20-23, 2020 // Dallas, TX

CUNA Enterprise Risk Management Certification School

April 27-29, 2020 // Clearwater Beach, FL

CUNA Finance Council Conference

May 17-20, 2020 // Anaheim, CA

CUNA Investment Certification Schools*

August 10-14, 2020 // Chicago, IL

CUNA Governance, Risk Management & Compliance Leadership Conference

September 21-23, 2020 // Austin, TX

HR & TRAINING

CUNA HR & Organizational Development Council Conference

April 19-22, 2020 // Orlando, FL

CUNA HR Compliance Certification School

July 26-29, 2020 // San Antonio, TX

CUNA Certified Credit Union Trainer School

August 5-7, 2020 // Chicago, IL

CUNA Experience Learning Live!

October 18-21, 2020 // Denver, CO

LENDING & COLLECTIONS

CUNA Business Lending Roundtable

January 28-29, 2020 // Tampa, FL

CUNA Consumer & Residential Mortgage Lending School

April 6-9, 2020 // Miami, FL

LENDING & COLLECTIONS (CONTINUED)

CUNA Business Lending Certification School

July 20-23, 2020 // Madison, WI

CUNA Collections & Bankruptcy School

September 21-24, 2020 // San Antonio, TX

CUNA Lending Council Conference

November 1-4, 2020 // San Diego, CA

CUNA Fair Lending Workshop

November 4-5, 2020 // San Diego, CA

MANAGEMENT & LEADERSHIP

CUNA Governmental Affairs Conference

February 23-27, 2020 // Washington, D.C.

CUNA National Young Professionals Conference

June 11-12, 2020 // Madison, WI

CUNA Management School

July 12-22, 2020 // Madison, WI

World Moving: A Joint Credit Union Conference

July 19-22, 2020 // Los Angeles, CA

CUNA Coaching Leadership School

August 3-5, 2020 // Chicago, IL

CUNA CEO Council Conference

2020 dates & location to be announced

CUNA Young Professionals Advocacy Workshop

2020 dates & location to be announced

CUNA Emerging Leader Institute

2020 dates & location to be announced

MARKETING & BUSINESS DEVELOPMENT

CUNA Marketing & Business Development Council Conference

March 15-18, 2020 // Orlando, FL

CUNA Digital Marketing School

June 1-4, 2020 // Seattle, WA

CUNA Marketing & Business Development Certification Schools

October 5-8, 2020 // Las Vegas, NV

OPERATIONS & MEMBER EXPERIENCE

CUNA World-Class Service Leadership School

June 10-12, 2020 // Seattle, WA

CUNA Member Experience, Sales & Service School

August 17-19, 2020 // Las Vegas, NV

CUNA Operations & Member Experience Council Conference

September 30-October 3, 2020 // Las Vegas, NV

SECURITY & TECHNOLOGY

CUNA Cybersecurity Conference with NASCUS*

June 1-3, 2020 // San Diego, CA

CUNA Technology Council Security Summit

September 29-30, 2020 // Las Vegas, NV

CUNA Technology Council Conference

September 30-October 3, 2020 // Las Vegas, NV

*eSchool is available.

Please note: All dates and locations are subject to change.

Category Directory

ANCILLARY DEBT PROTECTION PRODUCTS

Mercury Mechanical Protection

APPLICATIONS PROGRAMMING

Access Softek

ARCHITECTURE & CONSTRUCTION

The Redmond Company

ASSET LIABILITY MANAGEMENT

Alloya Corporate FCU
Catalyst Corporate FCU
Corporate Central CUSO-QuantyPhi
Corporate One FCU
VolCorp
WhiteCanyon Software

ASSOCIATE BUSINESS MEMBERS

Adlumin
Alloya Corporate FCU
Catalyst Corporate FCU
CO-OP Financial Services
Corporate Central CU
Corporate One FCU
CU Direct
LSC
Prodigy
PSCU
VolCorp

ATM & REMOTE DELIVERY

3SI Security Systems
CUNA Strategic Services

AUDIT

Nearman, Maynard, Vallez, CPAs
PolicyWorks, LLC

AUTO LENDING

Black Book
CO-OP Financial Services
Mercury Mechanical Protection
Origence

BANK SECRECY ACT (BSA)

Nearman, Maynard, Vallez, CPAs
PolicyWorks, LLC
VolCorp

BOARD RESOURCES

Rochdale Paragon Group

BRANDING

Datatrak

BRANCH MANAGEMENT

MagTek, Inc.

BRANCH SECURITY

3SI Security Systems
Adlumin
CUNA Strategic Services

BRANCH/PRODUCT/MEMBER/ PROFITABILITY

Creative Planning Strategic Advisor
Program

BUDGETING & PROCESS

GoVision CRM

BUSINESS DEVELOPMENT

GoVision CRM

BUSINESS LENDING

GoVision CRM
Jack Henry & Associates
Newtek Business Services Corp

CALL CENTERS

Access Softek
ConServe
CO-OP Financial Services
GoVision CRM
PSCU

CHECKS & WIRE TRANSFER SERVICES

VolCorp

CLOUD COMPUTING

Adlumin
MagTek, Inc.
Member Driven Technologies
Newtek Business Services Corp
Symitar

CLOUD PROCESSING

Prodigy

COLLECTIONS & RECOVERIES

REPAY

COMPENSATION

CU Solutions Group

CONSUMER LENDING

CUNA Strategic Services
Kasasa
Oak Tree Business Systems, Inc.
Origence

CONSULTANTS

Siewewright & Associates

CONSUMER LOAN SERVICING

REPAY

CONTRACT MANAGEMENT

Corporate Central CUSO – InterLutions

CORE PROCESSING ADMINISTRATION

Adlumin
AMI Information Systems
CompuSource Systems, Inc.
Corelation
CU-Interface mpowered
FIS
Fiserv
Member Driven Technologies
Prodigy
Share One, Inc.
Symitar
Synergent
Trellance

Category Directory

CREDIT CARDS

CO-OP Financial Services
FIS
Fiserv
Jack Henry & Associates
LSC
PSCU

CUNA STRATEGIC SERVICES

3SI Security Systems
Kasasa
LSC
Newtek Business Services Corp

CUSO

CO-OP Financial Services
CU Solutions Group
Prodigy
PSCU
Share One, Inc.
Trellance

DATA WAREHOUSE/DATABASE ADMINISTRATION

GoVision CRM
Trellance

DEBIT CARDS

CO-OP Financial Services
CUNA Strategic Services
FIS
Fiserv
Jack Henry & Associates
LSC
PSCU
Synergent

DEPOSIT PRODUCT INNOVATION

Kasasa

DIGITAL MARKETING STRATEGIES

CU Solutions Group
CUNA Strategic Services
Datatrac

E-COMMERCE

CO-OP Financial Services

ELECTRONIC BILL PAYMENT

CO-OP Financial Services
VolCorp

EMAIL MARKETING

CUNA Strategic Services
GoVision CRM
Origence
Synergent

EMPLOYEE BENEFITS

Corporate Central CUSO – InterLutions

EMPLOYEE DEVELOPMENT & TRAINING

Credit Union National Association
CUNA Councils

EXECUTIVE RECRUITMENT

Sievwright & Associates

FINANCIAL COMPLIANCE

3SI Security Systems
Adlumin
Continuity
CUNA Strategic Services
Oak Tree Business Systems, Inc.
PolicyWorks

FINANCIAL REPORTING - BOARD OR MANAGEMENT

Adlumin

FRAUD MANAGEMENT/OVERSIGHT

Access Softek
CO-OP Financial Services

GIFT/STORED VALUE CARDS

LSC

HOME EQUITY LENDING

Origence

HR COMPLIANCE

3SI Security Systems

HR OPERATIONS (PROCESSES)

WhiteCanyon Software



Origination + Experience.

Engagement
> POS
> Auto shopping
> Marketing & CRM

Origination
> Consumer LOS
> Mortgage LOS
> Indirect lending
> Retail financing

Operations
> Analytics
> Consulting
> Outsourced loan processing
> Insurance & aftermarket

ORIGENCE
A CU DIRECT BRAND

origence.com

Category Directory

HR SYSTEMS & TECHNOLOGY

3SI Security Systems
Newtek Business Services Corp

IDENTITY THEFT

Adlumin
CUNA Strategic Services
WhiteCanyon Software

IMAGING SYSTEMS/RECORDS

Canon USA, Inc.
WhiteCanyon Software

INCENTIVE SYSTEMS & PROGRAMS

CO-OP Financial Services

INDIRECT LENDING

Origence

INFORMATION & NETWORK SECURITY

Adlumin
Corporate Central CUSO – Emergifi
CUNA Strategic Services
Member Driven Technologies
WhiteCanyon Software

INSTANT ISSUANCE

MagTek, Inc.

INSURANCE

CUNA Mutual Group
Mercury Mechanical Protection
Newtek Business Services Corp

INVESTMENT SERVICES

Access Softek
Alloya Corporate FCU
Corporate Central CU
CUNA Mutual Group
QwickRate
VolCorp

INVESTMENT/BROKERAGE SERVICES

Corporate Central CUSO – QuanyPhi
Creative Planning Strategic Advisor
Program
CUNA Mutual Group
QwickRate

ITEM PROCESSING

Corelation

LEADERSHIP DEVELOPMENT/ SUCCESSION PLANNING

CU Solutions Group

LENDING IN DIGITAL & MOBILE CHANNELS

Access Softek
FICS
Happy Money
Origence
REPAY

LENDING REGULATIONS & COMPLIANCE

ComplianceTech
Continuity
Rochdale Paragon Group

LENDING TECHNOLOGY SYSTEMS & PLATFORMS

CUNA Strategic Services
FICS
Oak Tree Business Systems, Inc.
Origence

LIQUIDITY MANAGEMENT

Corporate Central CU
QwickRate
VolCorp

LOAN GROWTH STRATEGIES

Datatrak
GoVision CRM
Origence

LOAN PARTICIPATIONS

Alloya Corporate FCU
Corporate Central CUSO - QuanyPhi
VolCorp

LOAN PARTICIPATIONS & TRADING

Catalyst Corporate FCU

LOAN PORTFOLIO ANALYTICS

Corporate Central CUSO – QuanyPhi
Origence

MAIN OFFICE & BRANCH DESIGN

The Redmond Company

MEMBER ACQUISITION & RETENTION

Creative Planning Strategic Advisor
Program
CU Solutions Group
Datatrak
Kasasa

MEMBER PERSONAL FINANCE

Creative Planning Strategic Advisor
Program
Jack Henry & Associates

MEMBER REWARDS PROGRAM

CO-OP Financial Services
PSCU

MERCHANT PROCESSING

Newtek Business Services Corp

MORTGAGE LENDING

FICS
Origence
QRL Financial Services

MORTGAGE LOAN SERVICING

FICS
Midwest Loan Services

ONLINE BANKING/E-COMMERCE

Access Softek
CompuSource Systems, Inc.
CO-OP Financial Services
Cubus Solutions, Inc.
Newtek Business Services Corp
PSCU
Symitar

OPERATIONS

Corelation

OPERATIONS COMPLIANCE

Continuity
Credit Union National Association
Rochdale Paragon Group

OVERDRAFT PROTECTION/COURTESY PAY PROGRAMS

CUNA Strategic Services

Category Directory

PERFORMANCE MANAGEMENT

CU Solutions Group

PLASTIC CARD OPERATIONS & EMV

CO-OP Financial Services

FIS

LSC

PSCU

VolCorp

PROMOTIONS/ADVERTISING

Synergent

PUBLICATIONS

Credit Union National Association

PURCHASE-MONEY MORTGAGES

QRL Financial Services

REAL ESTATE & MARKET CONSULTING

The Redmond Company

REMOTE DEPOSIT CAPTURE

Catalyst Corporate FCU

LSC

MagTek, Inc.

VolCorp

RISK MANAGEMENT

Continuity

CUNA Mutual Group

PSCU

Rochdale Paragon Group

WhiteCanyon Software

SALES MANAGEMENT/SALES & SERVICE CULTURE DEVELOPMENT

Credit Union National Association

GoVision CRM

SBA LENDING

Newtek Business Services Corp

SECONDARY MORTGAGE MARKET

FICS

QRL Financial Services

SHARED BRANCHING

CO-OP Financial Services

STRATEGIC PLANNING & ADVISORY SERVICES

Siewwright & Associates

STORAGE AREA NETWORK (SAN) MANAGEMENT

Newtek Business Services Corp

TECHNOLOGY

Corporate Central CUSO – Emergifi

TECHNOLOGY COMPLIANCE

3SI Security Systems

Adlumin

CUNA Strategic Services

Member Driven Technologies

TRAINING & EDUCATION

Credit Union National Association

WEB DEVELOPMENT/MANAGEMENT

BankSITE® Services

CompuSource Systems, Inc.

CU Solutions Group

Newtek Business Services Corp

Share One, Inc.

WIRELESS (MOBILE) BANKING

Access Softek

CO-OP Financial Services

Cubus Solutions, Inc.

PSCU

Share One, Inc.

VolCorp

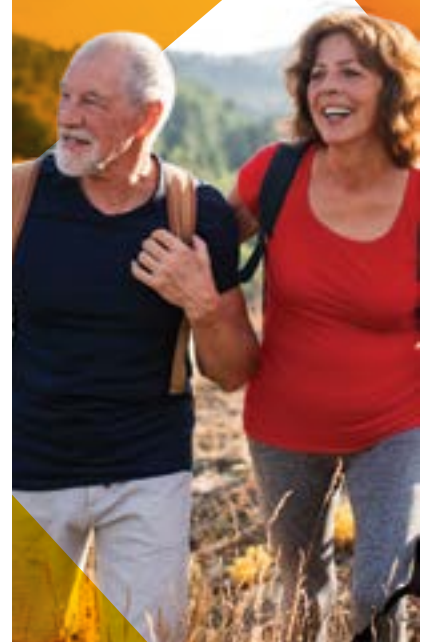
WORKERS COMPENSATION/SAFETY

Newtek Business Services Corp

YOUTH MATERIALS

Credit Union National Association

Symitar
A DIVISION OF JACK HENRY



MODERN MEMBERSHIP

Your members want to live a life well spent. You want to give them that opportunity.

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modernmember.com
modernmember@symitar.com
888-774-2265

Provider Directory



3SI Security Systems

101 Lindenwood Drive, Suite 200
Malvern, PA 19355

Lisa Moughan
610-280-2000
info@3si.com
www.3si.com

A CUNA Strategic Services alliance provider for over 25 years, 3SI provides effective security solutions that recover assets, help police apprehend criminals, and provide peace of mind to you, your staff and your customers. We combat crime at credit unions through technologies including GPS/GNSS tracking, cash staining, and safe branch opening/closing apps. Used in thousands of credit union branches, our tracking and staining technology protects from cash in teller drawers, ATMs, and cash dispensing/recycling units. Our newest technology, SafeResource, protects staff at their most vulnerable (during branch openings/closings), provides full audit information AND complies with Federal guidelines. Contact us to learn how we are creating a #SaferWorld.



Access Softek

727 Allston Way
Berkeley, CA 94710
Maddie Greene
510-898-7606

communications@accesssoftek.com
www.accesssoftek.com

Access Softek, Inc. lives on the cutting edge of digital banking technology. Dedicated to innovation and continually improving the member experience, Access Softek's most recent innovations include:

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- A fraud control tool which uses machine learning and a deep neural network to prevent fraud

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Since 2004, Access Softek has continued to deliver industry firsts to over 400 bank and credit union customers from its Berkeley, California headquarters. Learn more at AccessSoftek.com.



Adlumin Inc.

1701 Rhode Island Ave. NW
Washington, DC 20036
Col (Ret) Timothy Evans,
Esq., LL.M.
202-352-8001

timothy.evans@adlumin.com
www.adlumin.com

Leading SIEM Technology (Washington DC) | Adlumin is the leading Financial Institution cloud-native Security Information and Event Management (SIEM) solution, with world-class analytics and machine learning, and priced for any size business. Using the power of the cloud Adlumin is seamless to integrate into the customers environment, typically taking about an hour and 20 minutes to deploy and integrate. Adlumin provides the first ever cloud-native SIEM solution with the capability to monitor and defend customer networks locally, in the cloud, and across the globe. Adlumin has built NCUA's Automated Cyber Examination Tool (ACET) into the platform, which will become your system of record. Using Artificial Intelligence and Machine Learning Adlumin has built a SIEM platform that writes its own rules, customers don't need to struggle to write magical queries or SIEM rules to get the technology to work for them. Using advanced data science models Adlumin provides a hand's free SIEM platform, no PHD required. The first ever SIEM solution that is cost-effective, easy to use, and easy to integrate our robust platform provides unmatched security that defends your network from the security perimeter to the Dark Web.

Provider Directory



Corporate Federal Credit Union

Alloya Corporate FCU

184 Shuman Blvd., Suite 400
Naperville, IL 60563
Tim Bruculere
800-253-0053, ext. 3808
tim.bruculere@alloyacorp.org
www.alloyacorp.org

Alloya provides critical cooperative services and tremendous value to over 1,500 member credit unions and credit union entities nationally, including investment, financial, lending and correspondent services. Headquartered in Naperville, Illinois, Alloya offers a dependable and affordable line of credit, secure and efficient product access and settlement, and unparalleled member service to its members. To learn more, visit www.alloyacorp.org.



AMI Information Systems

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800-558-3709
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www.amiinfosys.com

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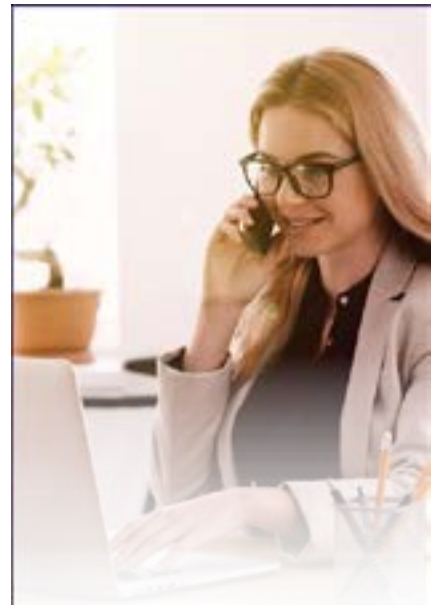
7047 E. Greenway Pkwy.
Suite 250
Scottsdale, AZ 85254
Ira H. Aurit
602-867-2330
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BankSITE® Services develops and hosts ADA Compliant Websites with an 20-year track record of no security issues, server downtime, or price increases. We offer mobile friendly, responsive websites created in 30 days with world-class hosting, security monitoring, and our NEW Secure Forms System allowing you to edit our forms, or create create new forms, and allow members to upload secure files. Our services are enjoyed by hundreds of FIs, and meet the guidelines of Federal Examiners.



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1745 N. Brown Road, Suite 130
Lawrenceville, GA 30043
Brian Clegg, Lender Solutions
Manager
770-533-5209
bclegg@blackbook.com
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Black Book® is widely used by the nation's top auto lenders for their vehicle valuation data. We provide the most accurate, market driven data that is used throughout the loan life cycle by the nation's top lenders, to grow loan volume and minimize loss severity. Please visit us at www.BlackBook.com.



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- Industry-best payments technology
- Business intelligence for actionable insights
- Transactional Data Mining with proven marketing ROI

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RIGHT TIME. RIGHT PLACE. RIGHT SOLUTION.

Provider Directory



Canon USA

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Melville, NY 11747
Robert Ladich
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bladich@cusa.canon.com
usa.canon.com/scanners

Canon's check transports and document scanners are designed to streamline payment and imaging processes in the areas of loan processing, teller capture, back counter check scanning and RDC. With the use of intelligent software and high-quality imaging, Canon's document and check scanners have the ability to securely and reliably store financial and related documentation while helping eliminate the need for manual data entry, which saves time and mitigates risks associated with most financial processes.



Catalyst Corporate Federal Credit Union

6801 Parkwood Blvd.
Plano, TX 75024
Karen Coble
214-703-7831
coblek@catalystcorp.org
www.catalystcorp.org

Catalyst Corporate Federal Credit Union is a wholesale cooperative financial institution serving nearly 1,400 credit unions nationally with innovative core financial services and superior back-office support. Services, designed specifically for the credit union industry, include payment solutions, liquidity, investment options and balance sheet management assistance.

Catalyst Corporate strives to be the premier corporate credit union, providing exceptional member value in an efficient, safe and sound manner. Catalyst Strategic Solutions, LLC, a wholly-owned subsidiary, combines its 30 years of experience with a cooperative business model to provide unparalleled service and access to analytical resources, strategic consultation and investment portfolio management services.



ComplianceTech

2010 Corporate Ridge, Suite 820
McLean, VA 22102
Dana Ginsburg
202-842-3800
danaginsburg@complianceotech.com
www.ComplianceTech.com

ComplianceTech's web-based solutions, LendingPatterns™ and Fair Lending Magic™, are used by lenders and regulators, to analyze, monitor and manage complex HMDA and Fair Lending issues. They provide the most complete and efficient solution for fair lending risk assessment and monitoring. Lenders can prepare for regulatory scrutiny and implement corrective action in advance of a fair lending exam thereby mitigating fair lending risk. The tools assess whether applicants have been treated fairly under ECOA and the Fair Housing Act.

Provider Directory



CompuSource Systems, Inc.

We Elevate Your Core

CompuSource Systems, Inc.

110 John Muir Drive
Amherst, NY 14228

Gary L. Gonzales
800-295-9100

info@css4cu.com
www.css4cu.com

CompuSource Systems, Inc. specializes in core processing systems for small and medium-size Credit Unions. As a major nationwide supplier, CompuSource has distinguished itself by providing the highest reliability and support to its customers.



ConServe

200 CrossKeys Office Park
Fairport, NY 14450
Lynn DiBiase
866-460-8912

salesinfo@conserve-arm.com
www.conserve-arm.com

For over 35 years, ConServe's innovative collection approach has helped our Clients maximize recoveries and reduce charge-off accounts. Our unique synergy of analytics-driven technologies and skilled collection experts optimizes collection results, increasing your return on investment.

Ethics and compliance drive all our activities. We adhere to the highest measures of quality, consistency, and performance standards. Our team is dedicated to Fostering Financial Freedom® by helping your members meet their financial obligations in a way that empowers them with a sense of control and self-esteem.

We call our redefined approach The ConServe Advantage®; we invite you to experience the difference yourself.



Continuity

59 Elm Street, Suite 300
New Haven, CT 06510
Cara Parsons
203-672-9846

cparsons@continuity.net
www.continuity.net

Continuity is a provider of regulatory technology (RegTech) solutions that automate compliance and risk management for banks, credit unions, mortgage companies and fintech firms. By combining regulatory expertise and cloud technology, Continuity provides a proven way to reduce regulatory burden and mitigate risk at a fraction of the cost. Continuity serves hundreds of institutions across the United States and its territories. Continuity's risk and compliance product set includes RiskAdvisor, RegAdvisor® Pro, RegAdvisor® State, RegControls™, ControlsBuilder™, Policy and Procedure Management and Vendor Management. Contact us at sales@continuity.net to find out more about our products.



Corelation

2305 Historic Decatur Road, #300
San Diego, CA 92106
Theresa Benavidez
619-876-5074

tbenavidez@corelationinc.com
www.corelationinc.com

Corelation's KeyStone core processing solution provides a truly open and "person-centric" system empowering credit unions to offer the best products and services possible for member attraction and retention. KeyStone's intricate code is elegant, yet powerful, as Corelation's development team has a proven track record of creating successful core processing solutions solely for credit unions. Corelation staff has dedicated their careers creating credit union technology and providing unparalleled client service. Discover the Corelation difference today.



Redmond provides a turn-key spectrum of services, including:

Strategic Business Planning
Location Analysis
Site Selection
Brokerage Services
Brand Implementation
Design
Construction

Redmond has completed more than 800 financial institution projects

We deliver the member growth and ROA you're seeking

Redmond will help you identify the right location and determine the appropriate size of your facility and help implement design elements needed so your facility:

- ✓ Enhances member experience
- ✓ Is a tool to attract employees
- ✓ Helps retain great employees



TheRedmondCo.com



Provider Directory



CO-OP Financial Services

9692 Haven Avenue
Rancho Cucamonga, CA 91730
Sales
800-782-9042
sales@coop.org
www.co-opfs.org

CO-OP Financial Services is a payments and financial technology company whose mission is ensuring the success of the credit union movement. CO-OP payments solutions, engagement services and strategic counsel help credit unions optimize member experiences to consistently provide seamless, personalized multi-channel offerings, while delivering secure, sophisticated fraud mitigation service. For more information, visit www.co-opfs.org.



Corporate One Federal Credit Union

8700 Orion Place
Columbus, OH 43240
Paul Hixon
614-825-9313
PHixon@corporateone.coop
www.corporateone.coop

Corporate One has been leading the way in providing premier investment, funding, and payment solutions for America's credit unions for 70 years. In addition to helping credit unions succeed, Corporate One continues to nurture and grow its wholly owned CUSOs: Accolade Asset/Liability Advisory Services, Lucro Commercial Solutions, and Sherpa Technologies.



Corporate Central Credit Union

6262 South Lowell Place
Muskego, WI 53150
Chris Felton
800-242-4747
chris.felton@corpccu.com
www.corpccu.com

Corporate Central and our Family of CUSOs offer innovative solutions to help credit unions succeed. Our employee benefits CUSO, InterLutions, delivers top-quality and low-cost healthcare coverage to over 7,000 credit union associates. QuanyPhi, our balance sheet optimization CUSO, provides a full array of investment, liquidity, and ALM consulting solutions. Our technology solutions CUSO, Emergifi, offers managed security, cloud migration, remote monitoring, and more. Together, we are a strong, progressive, and growing team helping credit unions to be wildly successful.



Creative Planning Strategic Advisor Program

5454 W. 110th Street
Overland Park, KS 66211
Clay Baker
314-882-6940
clay.baker@creativeplanning.com
www.creativeplanning.com/SAP

The Creative Planning Strategic Advisor Program is designed specifically to complement the wealth management services your financial institution currently provides to your members. Our program is not intended to replace or compete with your offerings, but to complement and enhance the overall member experience, maintaining your institution as their "go-to" source for all of their financial needs. We incorporate our wealth management services as part of your core offerings in order to deepen and strengthen your relationships with your valued members.



Credit Union National Association

5710 Mineral Point Road
Madison, WI 53705
Greg Michlig, Chief Engagement Officer
608-231-4090
gmichlig@cuna.coop
www.cuna.org

Credit Union National Association (CUNA) is the only national association that advocates on behalf of all of America's credit unions. Our mission is to support, protect, unify and advance the credit union movement by removing barriers, promoting awareness and providing solutions for service excellence. Together with state Leagues, we serve America's credit unions, which are owned by more than 115 million members. For more information about CUNA, visit cuna.org.

Provider Directory



CU Solutions Group

38695 7 Mile Road, Suite 200
Livonia, MI 48152
Nick Olexa
800-262-6285
nick.olexa@cusolutionsgroup.com
www.cusolutionsgroup.com

CU Solutions Group is an award-winning credit union service organization that offers products and services in the areas of technology, marketing, HR performance and strategic advisory, which include web services, mobile app solutions, digital advertising, Save To Win, Love My Credit Union Rewards, Performance Pro and Compease. The company has more than 100 investors comprised of credit unions, credit union leagues and credit union system organizations. Headquartered in Livonia, Mich., the organization has strategic partnerships with Sprint, Intuit TurboTax®, GSTV, AffirmX and CU Vendor Management. For more information, visit CUSolutionsGroup.com.



Cubus Solutions

3049 Independence Drive, Suite A
Livermore, CA 94551
Jacqueline Paul
925-344-8631
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Mark has spoken at more than 250 credit union events and is the recipient of a number of industry awards. In 2010, Mark was merited the Ambassador Award by the World Council of Credit Unions for helping credit unions better understand and capitalize on their market strengths.

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