

Buyers' Guide

Spring 2021

Insightful **resources.**

Valuable **connections.**

Be part of a credit union-specific, member-run professional network of more than 7,300 credit union leaders. CUNA Councils connects passionate people, great ideas, original content and relevant resources.

Why join CUNA Councils?

- Connect with peers who share your concerns and interests
- Stay current with trends and topics impacting your credit union and your work
- Unlock fast and easy access to trustworthy information, advice and solutions
- 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

Tools to navigate the changing economic landscape

CUNA's trusted economists are here to help you manage credit union operations by exploring the latest U.S economic trends, forecasts and customized peer-to-peer comparisons. With your CUNA membership, you have **complimentary access to over 30 resources** to help you make strategic decisions for your credit union and members.

Get monthly updates on:

- The economy and its impact on credit unions
- Credit union operating and financial results
- Economic and credit union forecasts

Customize credit union-specific reports that calculate:

- Peer financial comparisons
- Your credit union's impact on the local economy
- Capital ratio implications of asset growth and earnings scenarios

Access this library of resources to help you navigate the changing environment.

Credit unions collectively provided \$13.6 billion in member financial benefits in 2019

Category Directory

ALLOWANCE & PROVISION FOR LOAN LOSS

QwickRate

APPLICATIONS PROGRAMMING

Access Softek

ARCHITECTURE & CONSTRUCTION

The Redmond Company

ASSET LIABILITY MANAGEMENT

Catalyst Corporate FCU
Corporate One FCU
Corporate Central CUSO – QuantyPhi
VolCorp

ASSOCIATE BUSINESS MEMBERS

Adlumin Inc.
Alloya Corporate FCU
Catalyst Corporate FCU
CO-OP Financial Services
Corporate Central CU
Corporate One FCU
Credit Union Loan Source
ESP, Inc.
LSC
Origen, a CU Direct Brand
PSCU
Symitar
VolCorp

ATM DEPLOYMENT

BranchServ

ATM & REMOTE DELIVERY

3SI Security Systems
BranchServ
CUNA Strategic Services

AUDIT

ACES Quality Management
ficompli
Nearman, Maynard, Vallez, CPAs
NICE Actimize

AUTO LENDING

CUNA Strategic Services
defi SOLUTIONS

BANK SECRECY ACT (BSA)

NICE Actimize

BOARD RESOURCES

Rochdale Paragon Group

BRANCH MANAGEMENT

CUNA Strategic Services

BRANCH DEPLOYMENT/PLACEMENT

BranchServ

BRANCH/PRODUCT/MEMBER/ PROFITABILITY

CUNA Strategic Services

BRANCH SECURITY

3SI Security Systems
BranchServ
CUNA Strategic Services
NICE Actimize

BUSINESS CONTINUITY PLANNING

CUNA Strategic Services
KingsBridgeBCP

BRANCH CONTINUITY PLANNING & DISASTER RECOVERY

CUNA Strategic Services
Glia
KingsBridgeBCP

BUSINESS DEVELOPMENT

Podium
Social Assurance

BUSINESS LENDING

CUNA Strategic Services
Oak Tree Business Systems, Inc.

CALL CENTERS

Access Softek
CO-OP Financial Services
CUNA Strategic Services
Glia
PSCU

CHECKS & WIRE TRANSFER SERVICES

Alloya Corporate FCU
MagTek, Inc.
VolCorp

CLOUD COMPUTING

Alacriti
Glia
Member Driven Technologies
Millennial Vision, Inc.
NICE Actimize
Symitar

CLOUD PROCESSING

Prodigy

COLLECTIONS & RECOVERIES

defi SOLUTIONS
Payix Incorporated
PSCU
REPAY

COMMUNITY FINANCIAL EDUCATION

Ascendium Education Group
Social Assurance

COMPENSATION

CU Solutions Group

CONSUMER LENDING

Alogent
CUNA Strategic Services
Oak Tree Business Systems, Inc.
Origen, a CU Direct Brand

CONSULTANTS

Siewwright & Associates

CONSUMER LOAN SERVICING

defi SOLUTIONS
REPAY

CONTRACT MANAGEMENT

Corporate Central CUSO – InterLutions

CONTRACT MANAGEMENT & NEGOTIATION

Siewwright & Associates

CONVERSATIONAL BANKING

SilverCloud

CORE PROCESSING ADMINISTRATION

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

Category Directory

CREDIT CARDS

FIS
Fiserv
LSC
Member Access Processing
PSCU

CUNA STRATEGIC SERVICES

3SI Security Services
Kasasa
LSC
JMFA

CUSO

Comply-YES!
CO-OP Financial Services
CU Solutions Group
MagTek, Inc.
Member Access Processing
Prodigy
PSCU
Share One
Trellance

DATA WAREHOUSE/DATABASE ADMINISTRATION

Trellance

DEBIT CARDS

CO-OP Financial Services
CUNA Strategic Services
FIS
Fiserv
LSC
Member Access Processing
PSCU

DEPOSIT PRODUCT INNOVATION

MANTL

DIGITAL BANKING PLATFORM

Project Finance

DIGITAL MARKETING STRATEGIES

CU Solutions Group
CUNA Strategic Services
Glia
Kasasa
Podium
Social Assurance
Tyfone

E-COMMERCE

CO-OP Financial Services
MagTek, Inc.
NICE Actimize
PSCU

ELECTRONIC BILL PAYMENT

Alacriti
CO-OP Financial Services
Jack Henry
NICE Actimize
PSCU

EMAIL MARKETING

CUNA Strategic Services
PSCU

EMPLOYEE BENEFITS

Ascendium Education Group
Corporate Central CUSO – InterLutions
OM Financial Group

EMPLOYEE DEVELOPMENT & TRAINING

Credit Union National Association
CUNA Councils

EMPLOYEE/INTERNAL MARKETING

Social Assurance

FINANCIAL COMPLIANCE

3SI Security Systems
CUNA Strategic Services
NICE Actimize
Oak Tree Business Systems, Inc.
PolicyWorks featuring ViClarity
Social Assurance

FINANCIAL REPORTING - BOARD OR MANAGEMENT

Adlumin

FINANCIAL WELLNESS

Project Finance

FRAUD MANAGEMENT/OVERSIGHT

Access Softek
ACES Quality Management
CO-OP Financial Services
CUNA Strategic Services
FIS

GIFT/STORED VALUE CARDS

LSC



The vision
to push
boundaries.

THE EXPERIENCE TO
ACHIEVE LENDING
BREAKTHROUGHS.

Origence Enterprise Platform
and Lending Solutions:
Everything you need to achieve
your objectives

ORIGENCE
A CU DIRECT BRAND

INDIRECT LENDING

AUTO SHOPPING

CONSUMER LOS

MORTGAGE LOS

MORTGAGE POS

MARKETING & CRM

CONSULTING

OUTSOURCED LOAN
PROCESSING

ADDITIONAL SOLUTIONS

origence.com

Category Directory

HR COMPLIANCE

3SI Security Systems
OutSolve Affirmative Action &
Diversity Services

HR SYSTEMS & TECHNOLOGY

3SI Security Systems

IDENTITY THEFT

CUNA Strategic Services
NICE Actimize

IMAGING SYSTEMS/RECORDS

Alogent
Millennial Vision, Inc.

IN-STORE BRANCHES

MagTek, Inc.

INDIRECT LENDING

Jericho
Origence, a CU Direct Brand

INFORMATION & NETWORK SECURITY

Adlumin
Cipher Security
Corporate Central CUSO – Emergifi
IBT Apps
Jack Henry
Lares
Member Driven Technologies

INSTANT ISSUANCE

PSCU

INSURANCE

CUNA Mutual Group
Kasasa
OM Financial Group

INVESTMENT & FUNDING

Corporate One FCU

INVESTMENT SERVICES

Alloya Corporate FCU
Corporate Central CU
CUNA Mutual Group
OM Financial Group
QwickRate
SimpliCD
VolCorp

INVESTMENT/BROKERAGE SERVICES

Corporate Central CUSO – QuanyPhi
CUNA Mutual Group
SimpliCD

LEADERSHIP DEVELOPMENT/ SUCCESSION PLANNING

CU Solutions Group
Stewart Leadership

LENDING IN DIGITAL & MOBILE CHANNELS

Access Softek
defi SOLUTIONS
FICS
Jack Henry
REPAY
Statflo

LENDING REGULATIONS & COMPLIANCE

Comply-YES!
ficompli
Jericho
Rochdale Paragon Group

LENDING TECHNOLOGY SYSTEMS & PLATFORMS

defi SOLUTIONS
FICS
Jericho

LIQUIDITY MANAGEMENT

Corporate Central CU
QwickRate
SimpliCD

LOAN FRAUD MANAGEMENT

NICE Actimize

LOAN GROWTH STRATEGIES

Kasasa
Podium

LOAN PARTICIPATIONS

Alloya Corporate FCU
Corporate Central CUSO - QuanyPhi
Credit Union Loan Source

LOAN PARTICIPATIONS & TRADING

Alloya Corporate FCU
Catalyst Corporate FCU

LOAN PORTFOLIO ANALYTICS

Corporate Central CUSO – QuanyPhi
Jericho

MAIN OFFICE & BRANCH DESIGN

The Redmond Company

MARKETING COMPLIANCE

Comply-YES!
Social Assurance

MEDIA BUYING & PRODUCTION

Social Assurance

MEMBER ACQUISITION & RETENTION

CU Solutions Group
MANTL
Podium
PSCU
Statflo

MEMBER PERSONAL FINANCE

CUNA Strategic Services

MEMBER REWARDS PROGRAM

CO-OP Financial Services
PSCU

MORTGAGE LENDING

FICS
Member First Mortgage
Oak Tree Business Systems, Inc.
Origence, a CU Direct Brand
QRL Financial Services

MORTGAGE LOAN SERVICING

FICS
Member First Mortgage
Midwest Loan Services

ONBOARDING

MANTL

ONLINE BANKING/E-COMMERCE

Access Softek
Alacriti
Alogent
CompuSource Systems, Inc.
CUNA Strategic Services
Glia
IBT Apps
MANTL
NICE Actimize
Project Finance
PSCU
Symitar
Tyfone

OPERATIONS COMPLIANCE

BC in the Cloud by Infinite Blue
Comply-YES!
Credit Union National Association
ficompli
MANTL
NICE Actimize
Rochdale Paragon Group

ORGANIZATIONAL DEVELOPMENT

Stewart Leadership

Category Directory

OVERDRAFT PROTECTION/COURTESY PAY PROGRAMS

JMFA

PERFORMANCE MANAGEMENT

CU Solutions Group
Stewart Leadership

PLASTIC CARD OPERATIONS & EMV

CO-OP Financial Services
PSCU

PROMOTIONS/ADVERTISING

Social Assurance

PUBLIC RELATIONS

Social Assurance

PUBLICATIONS

Credit Union National Association

PURCHASE-MONEY MORTGAGES

Member First Mortgage
QRL Financial Services

REAL ESTATE & MARKET CONSULTING

The Redmond Company

RECRUITMENT/ONBOARDING/RETENTION

Ascendium Education Group

REMOTE DEPOSIT CAPTURE

Alloya Corporate FCU
Catalyst Corporate FCU
MagTek, Inc.

RESEARCH/MCIF/CRM/DEMOGRAPHICS/TRACKING & REPORTING

Marquis Software Solutions

RISK MANAGEMENT

ACES Quality Management
Adlumin
BC in the Cloud by Infinite Blue
CUNA Mutual Group
NICE Actimize
PolicyWorks featuring ViClarity
Rochdale Paragon Group

SALES MANAGEMENT/SALES & SERVICE CULTURE DEVELOPMENT

Credit Union National Association

SECONDARY MORTGAGE MARKET

FICS
QRL Financial Services

SHARED BRANCHING

CO-OP Financial Services

SMS MARKETING

Statflo

SOCIAL MEDIA

Social Assurance

STRATEGIC FINANCIAL PLANNING & BUDGETING

Catalyst Corporate FCU

STRATEGIC FINANCIAL PLANNING & ADVISORY SERVICES

Sievwright & Associates

STUDENT BRANCHES

MagTek, Inc

TALENT MANAGEMENT/WORKFORCE PLANNING

Stewart Leadership

TECHNOLOGY

Corporate Central CUSO – Emergifi

TECHNOLOGY COMPLIANCE

3SI Security Systems
Adlumin
BC in the Cloud by Infinite Blue
CUNA Strategic Services
IBT Apps
Member Driven Technologies
PolicyWorks featuring ViClarity

TRAINING & EDUCATION

Credit Union National Association

USER TECHNICAL SUPPORT

Glia

VENDOR CONTRACT NEGOTIATIONS

JMFA

WEB DEVELOPMENT/MANAGEMENT

BankSITE® Services
CompuSource Systems, Inc.
CU Solutions Group

WIRELESS (MOBILE) BANKING

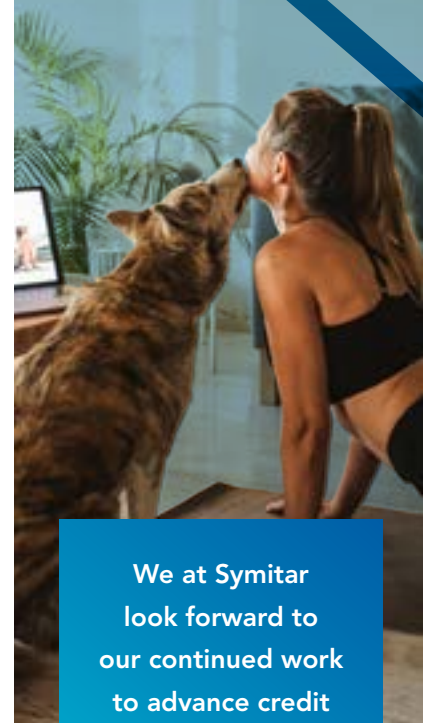
Access Softek
Alacriti
Catalyst Corporate FCU
Jack Henry
Member Access Processing
NICE Actimize
Tyfone

YOUTH MATERIALS

Credit Union National Association

MODERN MEMBERSHIP

Delivering Modern MembershipSM means you're a credit union committed to reaching your members when they need you most. That you are there with them – by their side – during unparalleled moments of need.



We at Symitar look forward to our continued work to advance credit union membership.

Symitar
A DIVISION OF JACK HENRY

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

3SI's solutions recover stolen cash, help police apprehend criminals, and protect branches, staff and members. Our GPS tracking and cash staining technologies already protect thousands of credit union branches...teller drawers, vaults, ATMs, and cash dispensing units. Our newest SaaS technology, SafeResource, protects staff during branch openings/closings, and provides comprehensive audit/reporting capabilities, emergency notification and active threat mitigation, and NCUA compliance. For 50 years, we've been helping to create a #SaferWorld...contact us to learn more.



Access Softek

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www.accesssoftek.com

Access Softek sets the standard for the digital banking landscape, having developed the first downloadable apps for mobile banking technology. Since that time, Access Softek has maintained a track record of innovation from its award-winning biometric authentication to real-time fraud prevention and automated investing integrated directly into a financial institution's digital banking platform. Since 2004, Access Softek has delivered industry firsts to over 400 bank and credit union customers from its Berkeley, California, headquarters. Learn more at AccessSoftek.com.



ACES Quality Management

205 North Detroit Street, Suite 200
Denver, CO 80206
Romina Cusenza
800-878-1598
rcusenza@acesquality.com
www.acesquality.com

ACES Quality Management is the leading provider of enterprise quality management & control software for the financial services industry. Three of the top 5 independent mortgage lenders & 50% of the top 50 lenders including several top 25 credit unions rely on ACES Quality Management & Control Software™ to improve audit throughout & quality while controlling costs. ACES delivers Flexible Audit Technology providing clients the ability to easily manage & customize ACES to meet their business needs.



Adlumin Inc.

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www.adlumin.com

Adlumin is a proud associate business member of the Credit Union National Association. Our patented cloud-native security and compliance automation platform revolutionizes the way credit unions secure sensitive data while achieving compliance objectives. With Adlumin, credit unions can monitor and defend their networks locally, in the cloud, and across the globe.

Adlumin's platform includes world-class analytics and machine learning, one-touch compliance reporting and automation tools, and integrated threat intelligence. It also includes a 24/7 search for leaked accounts on the deep and dark web, managed compliance, detection, and response (MCDR), 90-minute deployment, and more. The platform also includes the NCUA's Automated Cybersecurity Examination Tool (ACET) Compliance Reporting feature.

Adlumin was awarded U.S. Patents for using artificial intelligence and machine learning for systems and methods of anomaly detection on core banking platforms.

PROUD ASSOCIATE
BUSINESS MEMBER



Provider Directory

Alacriti

Alacriti

1551 South Washington Ave
Suite 130
Piscataway, NJ 08854
Alacriti Payments Consultants
908-791-2916
info@alacriti.com
www.alacriti.com

Alacriti is a leading financial technology company dedicated to helping credit unions accelerate their digital payments transformation, all without requiring legacy system overhauls or replacement. Alacriti's cloud-based platform, Orbipay, delivers solutions across the payments ecosystem, including The Clearing House's RTP® network, Electronic Bill Presentment and Payments (EBPP), and Digital Disbursements.

Orbipay solutions empower clients to deliver the innovative digital payment experiences today's members demand, such as real-time payments and Pay by Text. In addition to driving modern and frictionless digital payment experiences, our clients benefit from faster time to market and continuous innovation on a proven platform. You can also reach one of our experts at (908) 791-2916 or info@alacriti.com.



Corporate Federal Credit Union

Alloya Corporate FCU

184 Shuman Blvd., Suite 400
Naperville, IL 60563
Tim Bruculere
518-292-3808
jason.mchugh@alloyacorp.org
www.alloyacorp.org

Alloya provides cooperative financial services to 1,400 member credit unions and credit union entities nationally, including transaction, liquidity and investment 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, which are available to all credit unions with or without a capital contribution. In conjunction with its wholly owned CUSO, Alloya Solutions, LLC, Alloya leverages the power of aggregation to ensure its members remain competitive in today's marketplace. In addition to the support Alloya provides its membership, Alloya supports multiple credit union leagues and associations throughout the country and gives back to local communities nationwide by providing a variety of charitable donations. To learn more, visit www.alloyacorp.org.

PROUD ASSOCIATE
BUSINESS MEMBER



**LET'S
REIMAGINE
THE CREDIT
UNION
EXPERIENCE**

**Understanding
Your Needs
Through a
Collaborative
and Consultative
Approach**

FIS partners with you to run your systems by leveraging best-in-class infrastructure, analytics, automation, outsourcing and digital technologies.



For more information please visit fisglobal.com, call 877.776.3706 or email getinfo@fisglobal.com.

Provider Directory



Alogent

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Peachtree Corners, GA 30092
Wendi Klein
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marketing@alogent.com
www.Alogent.com

Alogent provides proven, end-to-end check payment processing, enterprise content management, digital banking, and loan origination technologies to financial institutions, currently including over 2,400 credit unions, community and regional banks, and some of the largest national and international financial institutions. Our solutions are versatile, scalable, user-friendly, and exceptionally stable. Because of our relentless focus on innovation, our clients consistently exceed their productivity, financial, and customer experience goals. Learn more about Alogent at www.alogent.com.



Ascendium Education Group

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jrecker@ascendiumeducation.org
www.attigo.com

For 50+ years, Ascendium Education Solutions® has supported student loan borrowers to positive outcomes. Everything we do, from our products and services to our philanthropy, is in service of our mission to help people reach their full potential. Ascendium provides Attigo®, a suite of student loan repayment benefits, student loan counseling, and financial wellness solutions. In partnership with higher education and business organizations Attigo supports people beginning with college access, through completion and into the workforce.



BC in the Cloud by Infinite Blue

399 Arcola Road, Suite 200
Collegeville, PA 19426
Sara Devinney
336-209-6800
sara.devinney@infiniteblue.com
www.bcinthecloud.com/cu

BC in the Cloud by Infinite Blue is a business continuity and disaster recovery application that provides the tools needed for credit unions to meet NCUA and FFIEC regulatory reviews. Easily conduct, track, and report on exercises so your branch is always audit-ready. From security breaches to hurricanes, BC in the Cloud helps ensure all of your locations are resilient no matter what kind of incident occurs. To learn more, visit www.bcinthecloud.com/cu.



AMI Information Systems

8348 Corporate Drive
Mount Pleasant, WI 53406
Joe Grauwels
800-558-3709
jgrauwels@amiinfosys.com
www.amiinfosys.com

The Encompass Software System delivers productive core processing to credit unions that demand a focused and user-friendly experience. Learn how modern technology can provide a higher level of service to your members in a productive and cost-effective manner. Contact us today to schedule a discovery session introducing you to the capabilities of Encompass!



Simple Solutions. Unimaginable Results.

BankSITE® Services

7047 E. Greenway Pkwy.
Suite 250
Scottsdale, AZ 85254
Ira H. Aurit
602-867-2330 ext. 4
ceo@banksiteservices.com
<https://www.banksiteservices.com>

BankSITE® Services develops and hosts world-class websites for credit unions with a 20-year track record of no security issues, server downtime, or price increases. We offer mobile friendly, responsive, ADA compliant websites created in 30 days. Our BankSITE® Security Monitor, Secure Forms, and copyrighted One-Minute Test Program have been used by over 1,500 financial institutions to bring them more loan, deposit and investment business. Ask us about creating a website for your credit union no charge.

Provider Directory



BranchServ

4 Research Drive
Bethel, CT 06801
Rebecca Cicarelli
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www.branchserv.com

BranchServ is a leading security/ automation equipment and service provider for financial institutions nationwide, working with the largest branch networks in the United States and extending its expertise to banks and credit unions of all sizes. Our comprehensive cutting-edge product portfolio is complemented by a service organization that is widely recognized for its ability to deliver on customer SLAs including quality and response time. Moreover, BranchServ is certified as an employee-owned organization, therefore our team is literally invested in our success...and yours. Our culture revolves around you as the customer, and we understand that our success hinges on our ability to understand your challenges and address them with real solutions.

Staffed with experienced application engineers and project managers, we are prepared to meet all of your product and service needs. Doing so enables us to help you put your Best Branch Forward and optimize the service you provide to your members. Talk to BranchServ for physical security, drive-up, video surveillance, access control, intrusion alarm, ATMs, ITMs, cash recyclers and service.



Catalyst Corporate Federal Credit Union

6801 Parkwood Blvd.
Plano, TX 75024
Karen Coble
214-703-7500
contactus@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 exceptional back-office support. Services, designed specifically for the credit union industry, include payment solutions, liquidity, investment options and balance sheet management assistance.

**PROUD ASSOCIATE
BUSINESS MEMBER**



Cipher Security

1111 Brickell Avenue
Miami, FL 33131
Bill Bowman
305-373-4660
bbowman@cipher.com
www.cipher.com

Cipher understands how important cybersecurity is for credit unions. Through our combination of expertise and security solutions, we protect Credit Unions from data breaches, ransomware, phishing, and other cyber related risks. The protection comes primarily in the form of CipherBox, our Managed Detection & MDR (MDR) solution. CipherBox includes 24/7 monitoring, threat intelligence, vulnerability alerting, and more. Members of CUNA can get started with a 30-day free trial.



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



Comply-YES!

7415 Chicago Road, Suite 103
Warren, MI 48092
Stephen Dedene
248-221-1828
comply@comply-yes.com
www.comply-yes.com

Comply-YES! is a CUSO redefining compliance by providing solution driven, relationship focused, and strategically aligned compliance services to its credit union allies. Comply-YES! is about finding ways to say “yes, you can” instead of “no, you can’t.” Comply-YES! changes the tone of what it means to be a compliance professional through collaboration and creating solutions that work.

Comply-YES! offers a full suite of affordable and cost-effective compliance solutions including:

- Full-service compliance officer solution that can save up to 60% of the cost of a full-time Compliance FTE
- Compliance and BSA audits
- Complaint management
- Audit and examination management
- Monitoring changes to laws and regulations
- Quality control reviews and much more

Comply-YES! can manage your compliance program so you can focus on what matters most — serving your members.



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 is a leading provider of complete core processing systems exclusively for credit unions. Our highly integrated core technology and services model makes our CompuShare System an ideal solution for credit unions seeking more value and agility. Servicing credit unions nationwide, CompuSource has the experience to support your current products and services and help realize your full membership potential.



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, person-centric system that is efficient, intuitive, and backed by unparalleled client service. KeyStone empowers credit unions to offer the best products and services for member attraction and retention. KeyStone's intricate code is elegant, yet powerful, as Corelation's developers have a proven track record of creating successful core technology solely for credit unions. Voted a San Diego Top Workplace in 2019 and 2020. Discover the Corelation difference!



CO-OP Financial Services

9692 Haven Avenue
Rancho Cucamonga, CA 91730
800-782-9042
marketing@coop.org
www.coop.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.coop.org.

PROUD ASSOCIATE
BUSINESS MEMBER



Provider Directory



Corporate Central Credit Union and Our Family of CUSOs (Emergifi, InterLutions, QuantyPhi)

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

PROUD ASSOCIATE
BUSINESS MEMBER



Corporate One Federal Credit Union

8700 Orion Place
Columbus, OH 43240
Christine Mayes
866-692-6771, ext. 9231
cmayes@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.

PROUD ASSOCIATE
BUSINESS MEMBER



STRATEGIC INSIGHTS.

TRUSTED ADVICE.

STRATEGIC PLANNING

ADVISORY SERVICES

DIGITAL STRATEGY

TECHNOLOGY SELECTION

PAYMENTS STRATEGY

SPEAKING ENGAGEMENTS

mark@
msiewewright.com

508.359.0145

siewewrightand
associates.com



Provider Directory



Credit Union Loan Source

3820 Mansell Road, Suite 140
Alpharetta, GA 30022
Kevin Usiatynski
770-310-5237

investors@culoansource.com
www.culoansource.com

CULS' offers a monthly loan participation subscription program providing CU's the chance to increase revenue by taking advantage of the indirect auto loan pipeline originated through a network of franchise dealers across sixteen states. Loans are underwritten to uniform credit guidelines for prime loans are designed to maximize net yields while maintaining acceptable levels of credit risk and loss performance. CULS provides an easy solution to credit unions with liquidity and/or difficulty generating loan volume.

**PROUD ASSOCIATE
BUSINESS MEMBER**



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 120 million members. For more information about CUNA, visit cuna.org.



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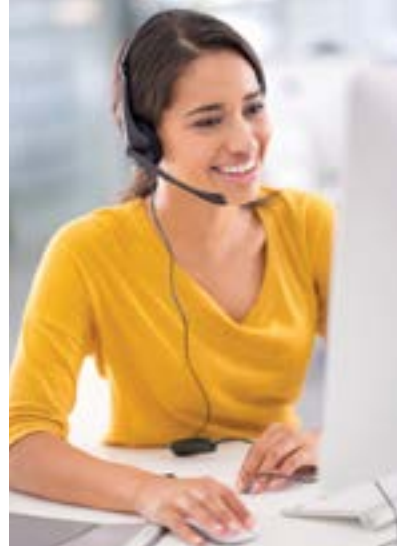
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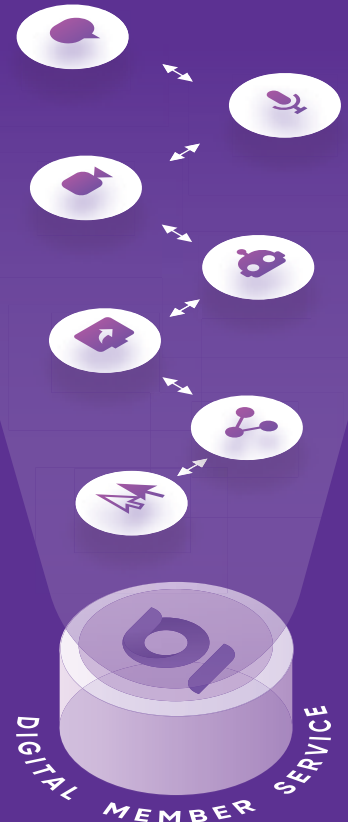


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If you like taking the application and telling the borrower they're approved, we can take care of everything else!



Realtime Electronic Payments

REPAY

3 West Paces Ferry Road NW
Suite 200
Atlanta, GA 30305
Kyle Harbuck
866-289-2430
info@repay.com
www.repay.com

REPAY is an innovative, full-service payment technology and processing provider. REPAY's payment technology helps credit unions increase member satisfaction and enhance the digital experience by offering members convenient and secure payment options. The REPAY platform provides credit/debit card processing, Instant Funding, ACH processing, IVR/phone pay, text pay, member-facing payment portals, including web portals and mobile apps, and electronic bill payment and presentment (EBPP) systems. Members can pay anytime, anywhere through self-serve integrated payment methods.



QwickRate®

QwickRate

1350 Church Street Ext. NE
Marietta, GA 30060
David Suri
800-285-8626
david.suri@qwickrate.com
www.qwickrate.com

QwickRate's value-added and affordable solutions for credit unions include: the premier CD Marketplace for institutional CD investing and funding with no transaction fees, unlimited support and automated accruals and reporting; CECLSolver™ for an easy to use and practical CECL solution; IntelliCredit™ for next generation loan reviews and risk management tools; and QwickBonds for greater access to the institutional bond market. Call us for more information.

Provider Directory



Rochdale Paragon Group

8575 W. 110th, Suite 220
Overland Park, KS 66210
Jeff Owen
913-890-8011
jowen@rochdaleparagon.com
www.rochdaleparagon.com

Rochdale Paragon Group, a CUSO formed by industry thought leaders, is a strategic and risk management firm specializing in enterprise risk management, vendor management, strategic planning, governance, lending support, and other consulting services for financial institutions. The firm offers clients a broad range of advice, analytics, support and solutions specifically designed to meet the risk, strategy and assurance needs of the financial industry. Rochdale Paragon also offers apogee iQ, a governance, risk and compliance (GRC) software suite that provides financial institutions the tools they need to grow and thrive. Like the credit unions they serve, Rochdale Paragon and apogee iQ are focused on one thing — meeting the needs of tomorrow, today.



Share One, Inc.

1790 Kirby Parkway, Suite 200
Memphis, TN 38138
Joan Nieman
800-888-0766
jnieman@shareone.com
www.shareone.com

Share One, a CUSO headquartered in Memphis, TN, offers the advanced core processing software NewSolutions. The robust core system delivers exceptional value with the flexible and comprehensive solution that features a unique member-centric imaging system and efficient operational workflows. Call for a free demo at 800-888-0766 or visit us online at www.shareone.com.



Sieviewright & Associates

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With decades of leadership experience in the financial services industry, Sieviewright & Associates provides strategic insights and trusted advice to credit unions. Founder Mark Sieviewright is a renowned industry consultant who has held senior leadership positions at HSBC, MasterCard International, Payment Systems Inc., TowerGroup, and Fiserv where he served as president of the credit union solutions division. Mark has worked directly with numerous credit unions in the successful formulation and execution of their strategic plans.



SilverCloud

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SilverCloud is an industry-leading provider of conversational banking solutions. Trusted by more than 200 financial institutions, SilverCloud's Conversational Banking platform provides financial services customers seamless access to information across all digital channels while simultaneously providing employees the information they need to serve banking customers. By combining knowledge, intelligence, and the right interfaces, SilverCloud's solutions provide an answer for every question, wherever and whenever. For more information, visit www.silvercloudinc.com.



SimpliCD

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Dublin, OH 43017
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800-639-0339
simpliCD-trading@epfc.com
www.epfc.com

SimpliCD is owned and operated by Primary Financial Co LLC, a CUSO created to allow credit unions to easily place substantial funds in federally insured CDs without the time, hassle, and expense of doing it themselves. Our investors enjoy exclusive rates, one monthly statement, and one consolidated monthly interest payment.

In addition, SimpliCD serves as an excellent source of liquidity. Issue anywhere from \$100,000 to \$50 million or more in a single transaction with no subscription, broker, or transaction fees associated with our traditional custodial certificate program. Gain access to our network of more than 3,500 credit unions and have the option to settle everything through your corporate. SimpliCD also offers a DTC option. Contact us or your corporate credit union today for more information.

Provider Directory



Social Assurance

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Social Assurance provides the financial services industry with a suite of software solutions, services and storytelling tools that help build Remarkable brands, culture and communities. Founded in 2011, with a mission to empower, ignite, and enable financial brands to be Remarkable, Social Assurance now serves over 1,500 financial brands across the country, helping them leave their mark and be the heroes of their community.



Stewart Leadership

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Stewart Leadership is a global organization that specializes in leadership assessment & development, board services, career management, strategic planning, DEI, and facilitation. Our consultants partner closely with our clients to design customized human capital solutions that produce business and people results at the individual leader, team, and organizational levels. Contact us through stewartleadership.com for a complimentary introduction to discuss how we can partner to build and align your human capital.



Symitar

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Symitar joins our credit union partners to serve the needs of the Modern Member. We offer an open technology foundation that enables and promotes your people-helping-people goals. From open APIs to member-centric core, digital, lending, and payments capabilities, we stand ready to boost your success. Symitar is your human-centered, tech-forward, insight-driven partner. Together, we advance the value and importance of credit union membership.

PROUD ASSOCIATE
BUSINESS MEMBER



Statflo

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TextKit is Statflo's one-to-one business text messaging platform that enables credit unions to engage, retain, and grow their member base. Using TextKit, credit unions can leverage a single platform to conduct member outreach via SMS and other messaging channels to drive member engagement. TextKit's open APIs connect easily to existing enterprise systems, while its industry-leading compliance features safeguards against inappropriate content and non-compliant activity within the platform. TextKit simplifies one-to-one outreach for member-facing teams.



The Redmond Company

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Redmond provides a spectrum of services, including market analysis, site selection, brokerage services, brand implementation, design and construction — resulting in member growth and increased ROA. We help identify the optimal location and determine the "right" size of your facility — making your facility a tool to attract and retain employees and enhance the member experience. Redmond's experience with national retailers, gives us knowledge of retail-based design strategies and consumer-purchasing patterns. Think Branch Of The Future.

Provider Directory



Trellance

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Trellance is the leading data analytics company for credit unions. Founded in 1989, Trellance is headquartered in Tampa, FL and services over 1,500 credit unions nationwide. The Trellance team consists of experts who specialize in data integration and warehousing, data consulting, and data-driven portfolio growth management that empowers credit unions to drive the member experience.



Tyfone

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Tyfone is a leading provider of digital banking solutions. Our appeal is unique. We collaborate closely with our customers and the banking ecosystem in an open approach coupled with a powerful user experience that helps "get things done!" Everyone builds features, not everyone builds relationships. We build both!



VolCorp

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VolCorp's mission is to inspire credit unions to reach new heights by providing dynamic payment solutions, custom investment services, and unparalleled member service. Headquartered in Nashville, Tennessee, VolCorp has been serving the credit union movement since 1981.

VolCorp equips credit unions with the products and services to help them prosper. Our new CUSO, Symphony, offers guidance to credit unions in critical areas such as business continuity management, enterprise risk management, information security, and supervisory committee audits.

To learn more about VolCorp, please visit volcorp.org.

**PROUD ASSOCIATE
BUSINESS MEMBER**



CUNA

MAP 

MEMBER ACTIVATION PROGRAM

HOW CAN THIS HELP YOUR CREDIT UNION?

More Engagement

Advocacy communications make members feel more connected to your credit union.

More Business

82% of members are more inclined to do business with your credit union after receiving advocacy communications.

More Satisfaction

Self-described credit union "members" view credit unions 89% more favorably than banks.

CUNA Member Activation Program enables credit unions to fully harness the advocacy potential of their membership with **three simple steps**:

1. We provide plug-and-play content on advocacy issues.

2. You deliver the content to members.

3. Members find ways they can fight for your credit union's future.

"Advocacy is part of our Culture...We take our responsibility to keep our law makers informed of who we are and what we do very seriously. MAP has made it possible for us to take our message directly to our members and enlist their help in telling our story."

Angela McCathran - President/CEO, People's Trust FCU

"We felt strongly that advocacy is a huge cause for all credit unions no matter what their size. MAP made it easy for a small credit union like ours to educate and activate our members."

Amy Brodersen – CEO, Family Focus FCU



Board & Committee

CUNA Credit Union Board Accelerator Virtual Conference
April 6 & 7

CUNA Credit Union Finance for Boards & Committees eSchool
June 7 – July 29, Mondays

CUNA Strategic Planning eSchool
September 13 – October 4, Mondays

CUNA Board Development Virtual School
October 13 & 14

CUNA Credit Union Board Leadership Virtual Roundtable
November 16 & 17

CUNA Supervisory Committee & Internal Audit Virtual Conference
December 7 – 9

Compliance

CUNA Regulatory Compliance Certification eSchool: Introduction
10 sessions beginning January 26

CUNA & ACUIA Internal Audit Certification Virtual School
6 sessions beginning in March

CUNA Compliance Management eSchool
March 5, 12 & 19

CUNA Regulatory Compliance Certification eSchool: Update
August 2 – September 27, Mondays

CUNA Governance, Risk Management & Compliance Leadership Virtual Conference
September 28 – 30

CUNA Compliance Professional eSchool
September 30 – October 28, Thursdays

CUNA Introduction to Compliance eSchool
October 13, 20 & 27

CUNA Attorney's Virtual Conference
October 26 – 28

CUNA BSA/AML Certification eSchool with NASCUS
April – November

Finance & Economics

CUNA Financial Management Essentials eSchool
January 6 – February 24, Wednesdays

CUNA ERM Introduction eSchool
January 28 – February 25, Mondays & Thursdays

CUNA Latest Trends in Investments eSchool
March 2 – April 8, Tuesdays & Thursdays

CUNA Investment Certification eSchool: Fundamentals
May 4 – June 1, Tuesdays & Thursdays

CUNA Finance Council Virtual Conference
May 18 – 20

CUNA Financial Management Essentials eSchool: Advanced
September 29 – November 17, Wednesdays

CUNA Investment Certification eSchool: Advanced
October 4 – November 1, Mondays & Wednesdays

CUNA ERM Advanced eSchool
October 7 – November 4, Thursdays

CUNA Credit Union Finance eSchool
November 8 – 11

CUNA ALM eSchool
December 6 – 13, weekdays

HR & Training

CUNA HR & Organizational Development Council Virtual Conference
April 20 – 22

CUNA Facilitator Certification Virtual School
June 22 – July 1, Tuesdays & Thursdays

CUNA HR Compliance Certification Virtual School
August 3 – 5

CUNA Experience Learning Live!
Adjust to: October 19 – 21, Virtual

CUNA HR Professional eSchool
November 29 – December 20, Mondays

Lending & Collections

CUNA Business Lending Virtual Roundtable
February 9 & 10

CUNA Consumer & Residential Mortgage Lending Virtual School
April 13 – 15

CUNA Financial Counseling Certification Program (FiCEP) eSchool
June 9 – August 25, Wednesdays

CUNA Business Lending Certification Virtual School
Beginning in June

CUNA Financial Counseling Certification Program (FiCEP) Update eSchool
August 24 & 26

CUNA Collections & Bankruptcy Virtual School
September 14 – 16

CUNA Fair Lending Virtual Workshop
October 5 & 6

CUNA Lending Council Virtual Conference
November 2 – 4

Management & Leadership

CUNA National Young Professionals Virtual Conference
TBD

CUNA Governmental Affairs Conference (GAC)
March 2 – 4 // Virtual

CUNA Management School
Beginning in July // Virtual

CUNA Coaching Leadership Virtual School
September 7 – 9

CUNA CEO Council Conference
Beginning in September

Marketing & Business Development

CUNA Marketing & Business Development eSchool
Beginning in February (tentative)

CUNA Marketing & Business Development Council Virtual Conference
March 23 – 25

CUNA Digital Marketing Virtual School
May 11 – 13

CUNA Marketing Compliance eSchool
July 12, 19 & 26

CUNA Marketing & Business Development Certification Virtual School
Beginning in October (tentative)

Operations & Member Experience

CUNA IRA Fundamentals eSchool
January 8 – February 25

CUNA IRA Advanced eSchool
February 25 – April 15, Thursdays

CUNA Member Experience Virtual School
August 17 – 19

CUNA Frontline Compliance eSchool
May 7 – October 8

CUNA World-Class Service Leadership eSchool
September 7 – 30, Tuesdays & Thursdays

CUNA Operations & Member Experience Council Virtual Conference
September 21 – 23

Security & Technology

CUNA Business Continuity eSchool
May 3 – June 7, Mondays

CUNA Technology Council Virtual Conference
September 21 – 23

CUNA Cybersecurity eSchool with NASCUS
October 5 – November 9, Tuesdays

Thank you to our CUNA Associate Business Members serving as business advocates for the credit union movement

Elite



Premier



Choice



Associate

