

CU*ANSWERS

A CREDIT UNION SERVICE ORGANIZATION

6000 28th Street SE, Grand Rapids, MI 49546
Toll Free: (800) 327-3478



Helping You Understand PFM

CU*Answers clients have asked periodically about a PFM (Personal Financial Management) product which they could offer to their members. While the level of interest has been marginal, the topic seems to surface regularly so we continue to throw the initiative back into your court and see if a champion rises to the challenge.

Knowing we are in the investigative process, CU*Answers clients are invited to product demos by two separate, but well known PFM Vendors. We recognize that there are a number of PFM vendors and we don't favor any particular provider. We support our network of credit unions intentional about moving forward in the near future with a PFM product. However, there has to be evidence of support and energy behind the concepts. PFM is a viable service you can offer to members and it's also a driver enabling strategic momentum for your credit union's significance in the market. Recently two PFM vendors have invited clients of CU*Answers to join them for an online demo via web conference.

Two demos are offered free of charge to the general public and we encourage you to attend. Although each demo will be product specific you will gain insight into what PFM can do for your credit union and how your members can benefit as well. Please follow the specific registration instructions below.

Who Should Attend: CEOs, CFOs, CIOs, & Leaders

Information to include when registering:

Name:

Email Address:

Phone Number:

Credit Union Name:

CU* Answers Client:

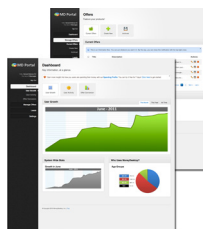
In chronological order by event time, here are both options.

moneydesktop™ www.moneydesktop.com

Register Online (Just click the link below.)
new.moneydesktop.com/cu_answers

Date
Thursday, January 27

Times
11:00 am -12:00 pm EST or
3:00 pm - 4:00 pm EST



If your schedule does not permit these times, contact:
demo@moneydesktop.com
to schedule a private demo.

Learn How To

- Transform your CU into a financial management hub at no cost to you or your members.
- Use PFM to enhance your competitive edge.
- Increase revenue, member retention and wallet share.
- Help your members understand their finances.

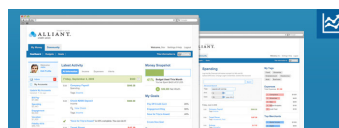


Geezeo™ www.geezeo.com

To Register
Email this form to: sward@geezeo.com

Date
Thursday, January 27

Time
1:00-2:00 pm EST



If your schedule does not permit these times, contact: Stephen Nigri
snigri@geezeo.com or 917-364-5678 to schedule a private demo.

Learn How To

- Embrace this new banking strategy.
- How PFM engages members.
- Demonstrate true advocacy at your CU.
- Drive revenue and share of wallet.

