

CU*ANSWERS

Our Next Adventure

LEADERSHIP CONFERENCE 2022

WELCOME!

**Thanks for joining us on
this adventure!**



The Plan for Today

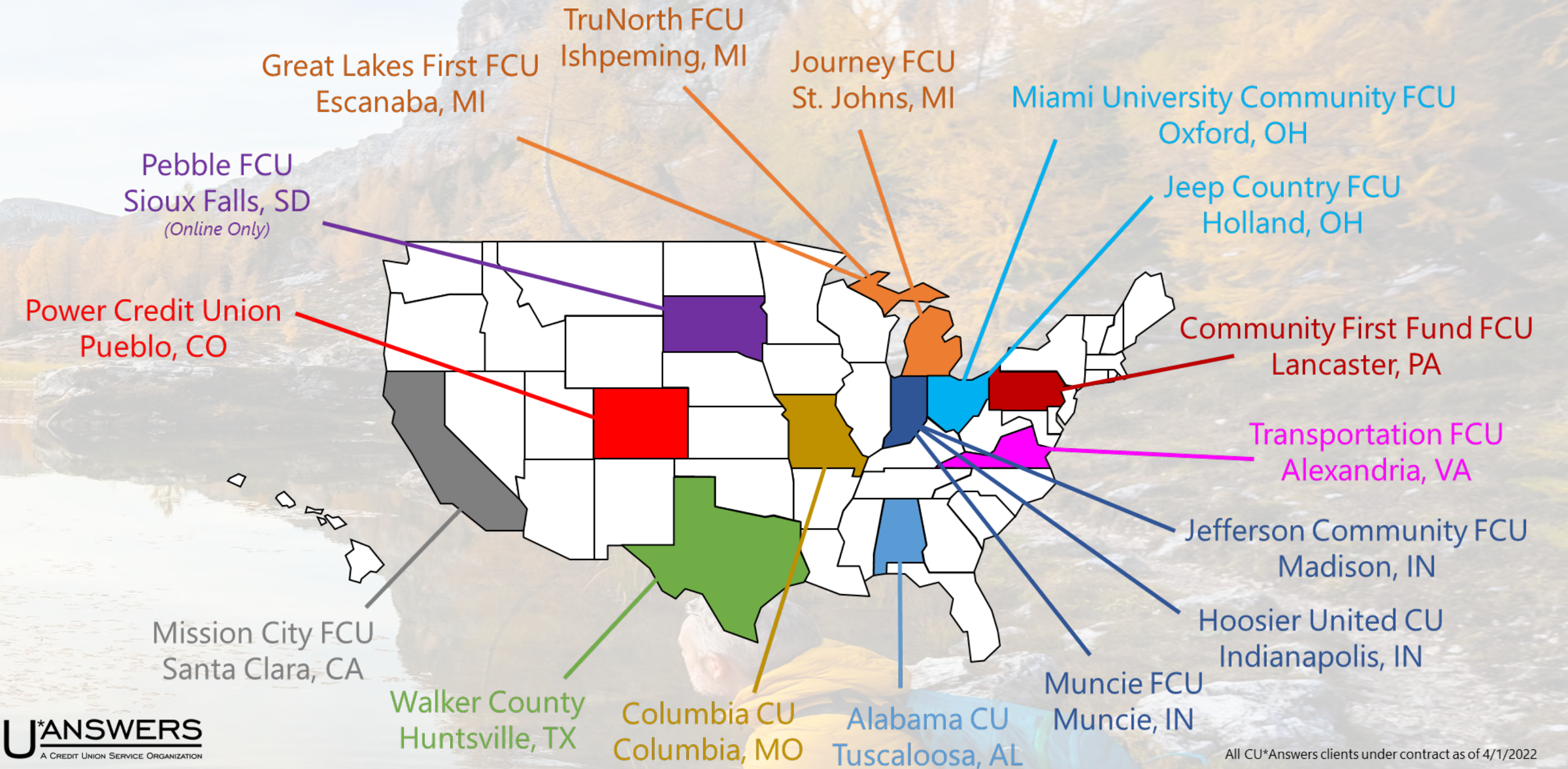


- ▶ Big-picture strategies from the CEO's vantage point
- ▶ Let's hear from some other voices
 - Conversations with key teams on what your CUSO has been up to, and what's coming in the next year
- ▶ Lunch at the Amway Grand
- ▶ More conversations with our teams
- ▶ Wrap-up

Greetings to New Peers!

New Peers to Greet

16 New CU*Answers clients in **11** states since last time!



Setting Conversion Records in 2021

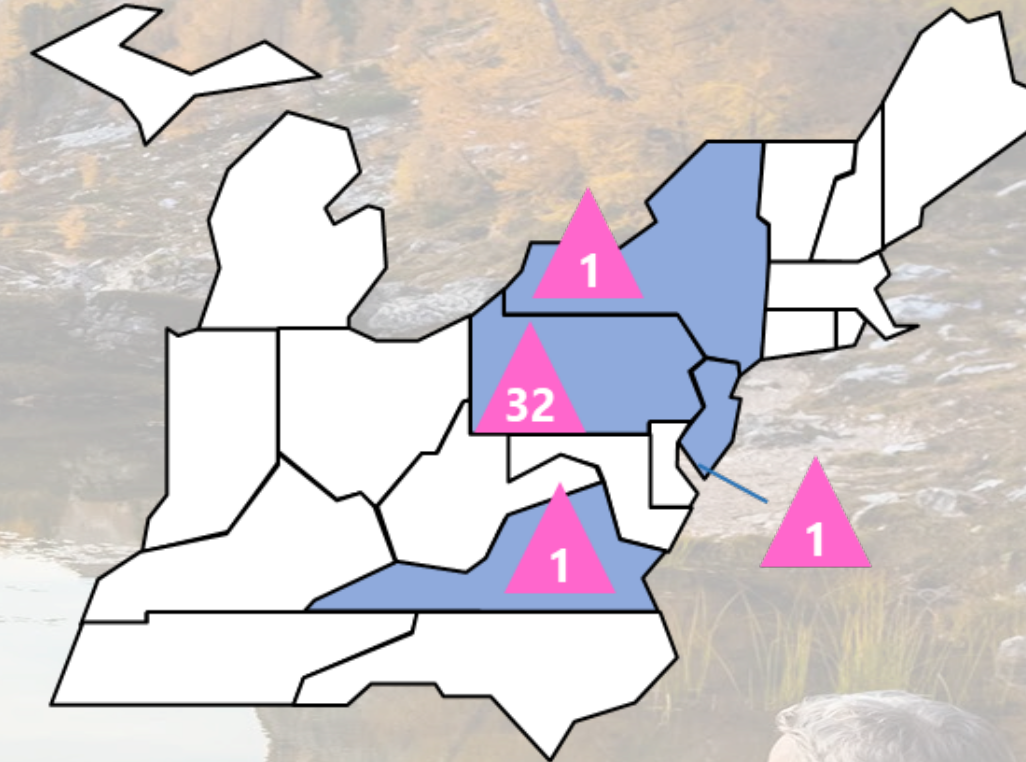
- ▶ 46 conversion/merger projects since we last met!
 - 28 new client conversions
 - 2 new Servicer Edition clients
 - 1 start-up CU
 - 9 mergers
 - 6 deconversions
- ▶ Fiscal year 2022 already has 41 projects scheduled

Partnerships Update: CU Axis

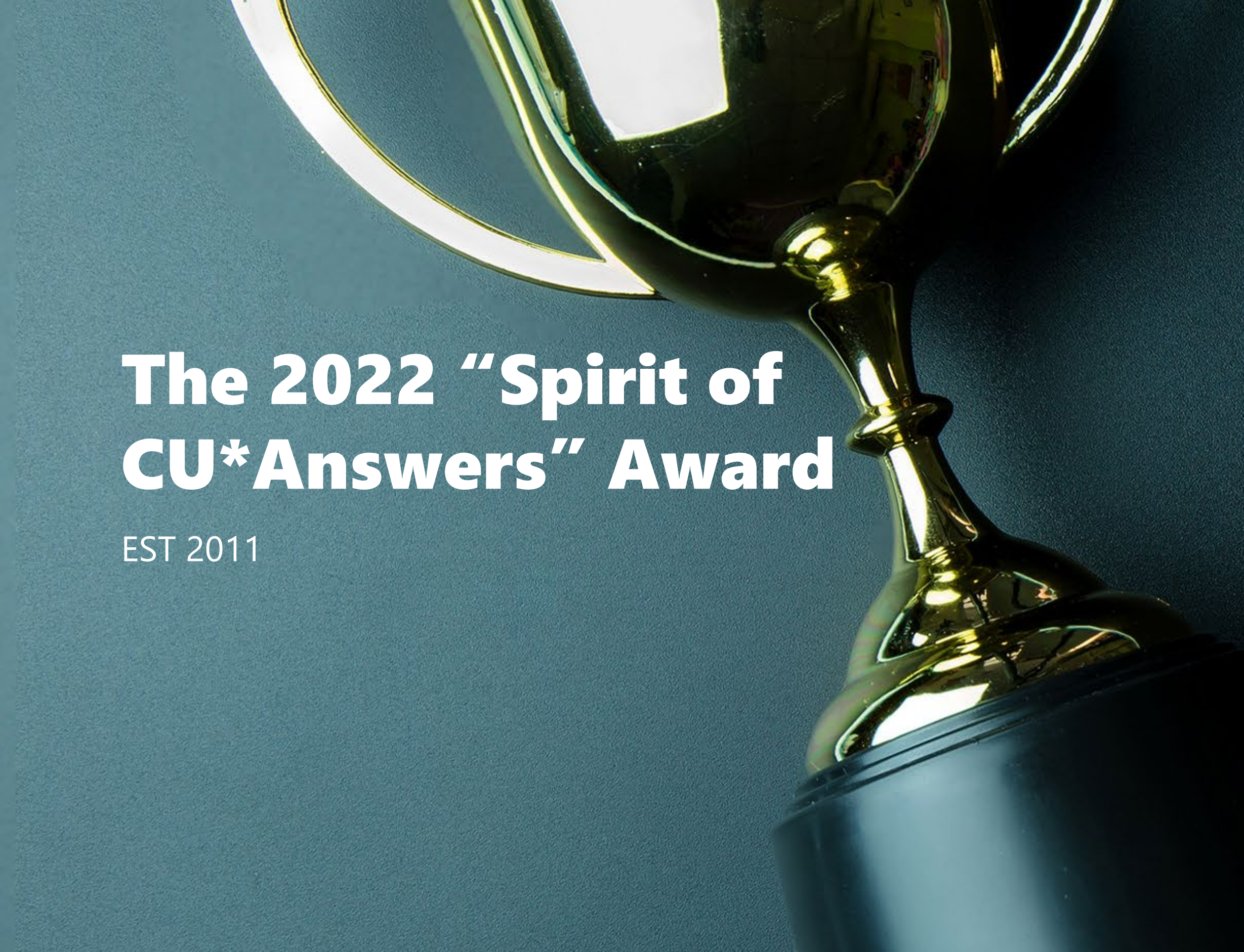


cuasterisk.com

35
CU*BASE Credit Unions
in **4** States



Includes all clients under contract as of 4/1/2022



**The 2022 “Spirit of
CU*Answers” Award**

EST 2011

Vizo Financial
for their partnership on the
CU Axis
initiative

Accepting the award today:
Charnell Etzweiler
Senior Product Manager
of Internal Systems



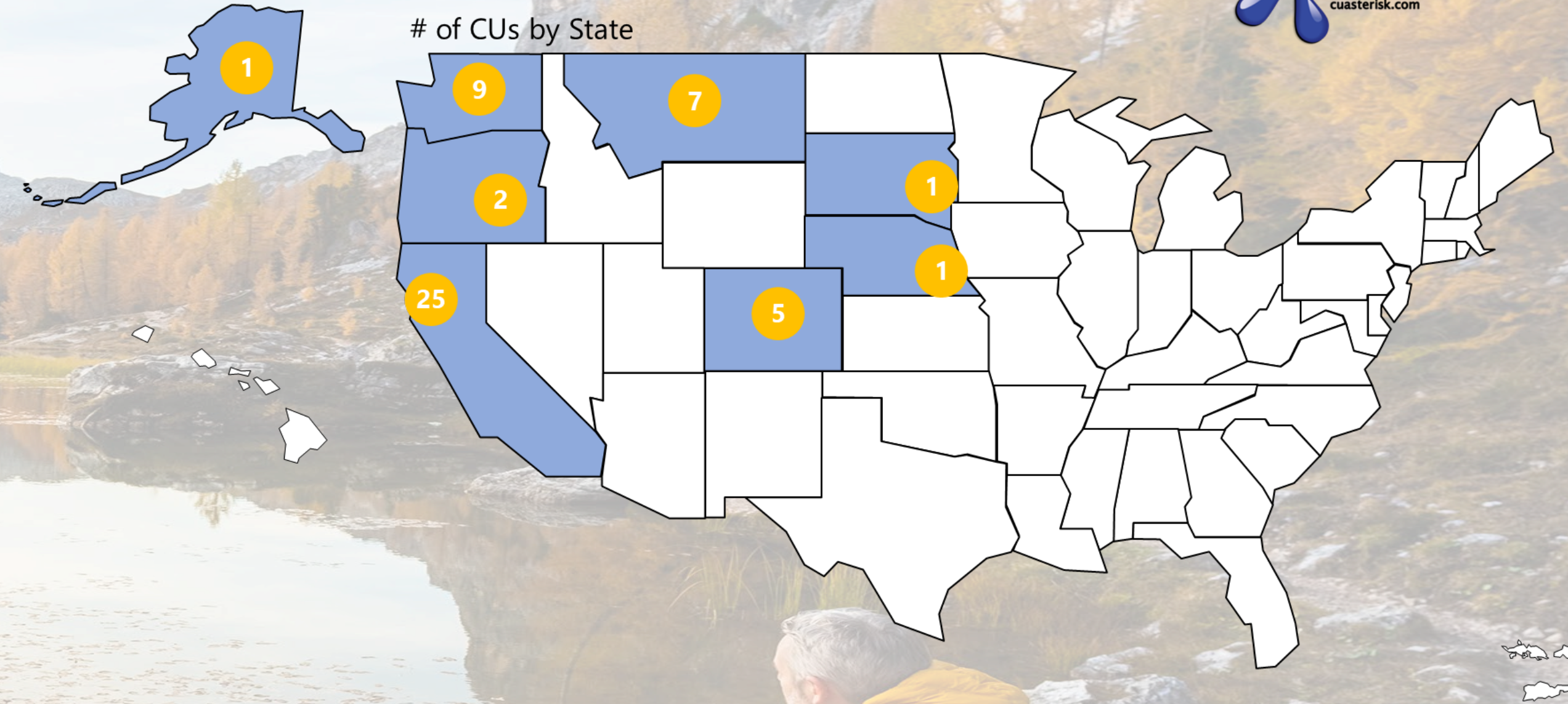
Partnerships Update: CU*NorthWest

CU*^{NORTHWEST}
A CREDIT UNION SERVICE ORGANIZATION



51
CU*BASE Credit Unions
in **8** States

of CUs by State



Includes all clients under contract as of 4/1/2022

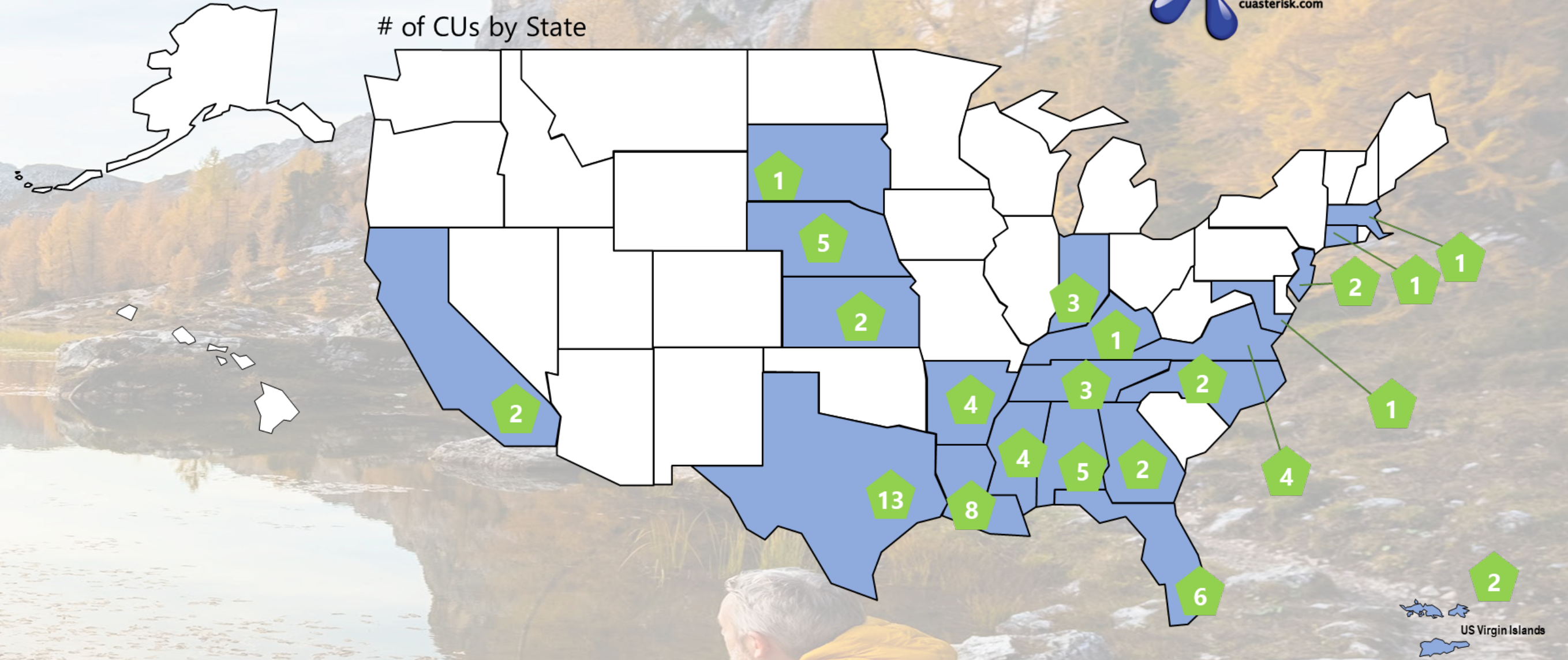
Partnerships Update: CU*South

CU*SOUTH
A CREDIT UNION SERVICE ORGANIZATION



72
CU*BASE Credit Unions
in **21** States

of CUs by State



Includes all clients under contract as of 4/1/2022

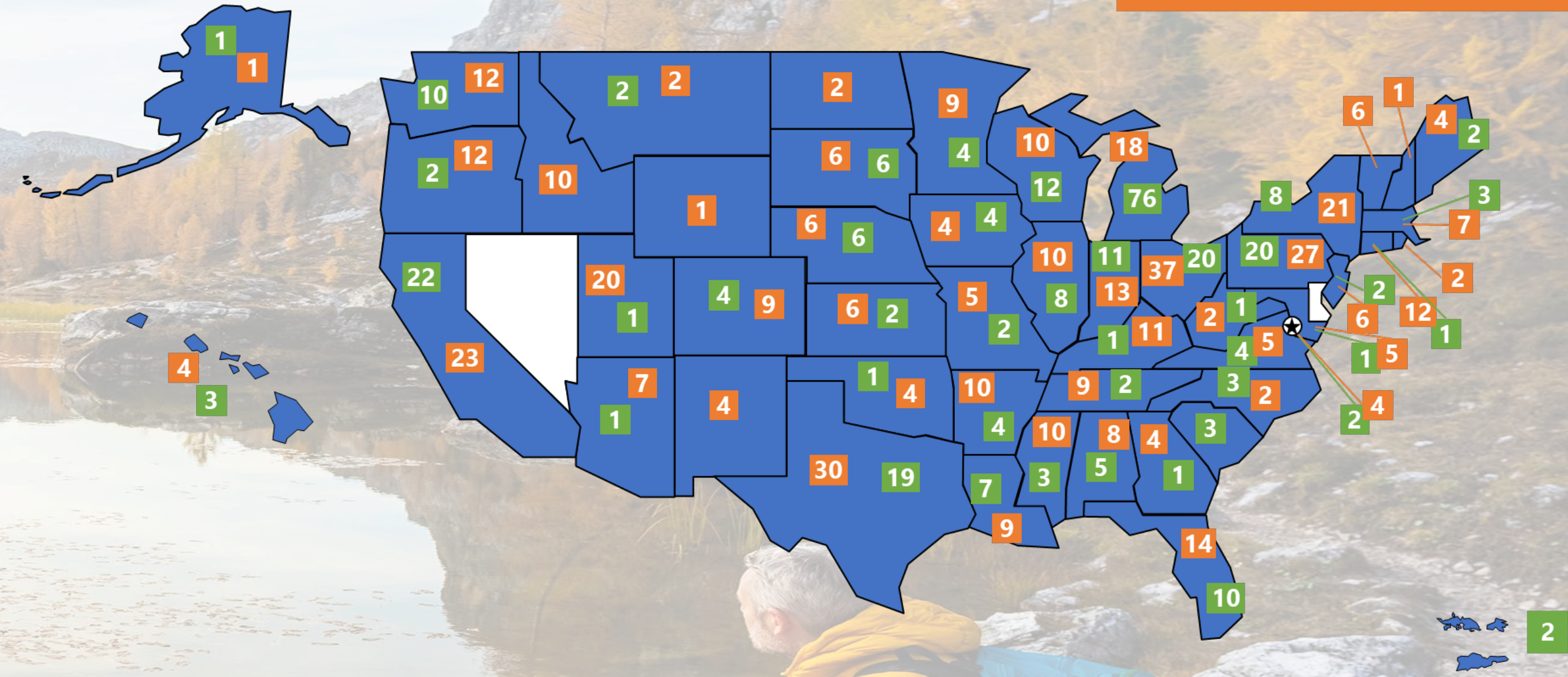
Partnerships Update: eDOC Innovations



302 In-network CUs in **43** States
2.5 million members



444 Out-of-network CUs in **48** States
4.6 million members



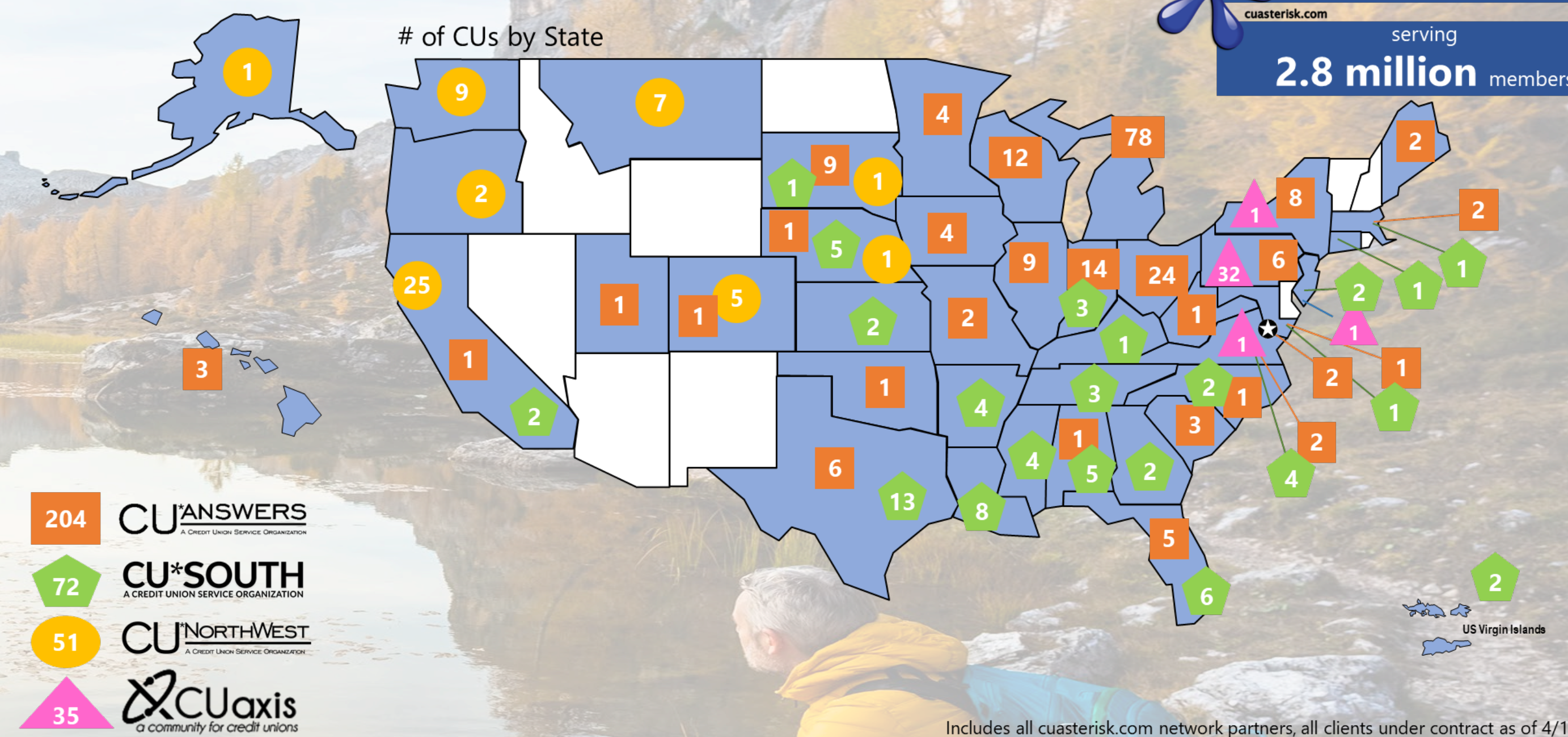
Partnerships Update: Xtend



The CU*BASE Network

CU*BASE Credit Unions by State

362
CU*BASE Credit Unions
in **42** States
serving
2.8 million members



Big-picture Strategies for the CUSO

In 2022 and 2023



New POWER i

- ▶ A new box has arrived
 - Increased power to handle the workload of new encryption requirements, millions of API connections, expanded data warehousing
- ▶ Staging and testing have started
- ▶ HA rollover to move into production planned for July

Payment Card Industry (PCI) Compliance

- ▶ Why?
 - Digital card issuance and provisioning to wallet
 - Originating direct payments on the debit card rails within our network (vs. a third party)
 - Checking a box on RFPs
- ▶ Where are we?
 - Pre-exam is done; will do foundational changes in 2022
 - Parallel track on these other projects starting this year

New Partnerships

- ▶ What is your cooperative scorecard when assessing a new vendor partnership?
- ▶ Does your RFP consider the cooperative principles?

New Partnerships: Member Access Processing (MAP)

- ▶ A credit union-owned cooperative
- ▶ Provides ATM/debit and credit card processing to more than 100 CUs across 30 states
- ▶ Serves 10 million members and over \$100 billion in credit union assets



New Partnerships: Payrailz

- ▶ Starting with their P2P offering as a standalone option
 - Uses the plastics network
 - Access to Venmo, real-time payments
 - Options for in-network clearings (CU*BASE to CU*BASE)
- ▶ SSO option for the presentation layer
 - Reduces integration time (2022 vs. 2023)
 - Our look & feel, but we don't have to do all the work

Servicer Edition

SE success stories:

- ▶ Life Assets in Washington, DC
- ▶ Members Source CU in Merrillville IN
- ▶ First Financial CU in Skokie, IL
- ▶ Services Credit Union in Naperville, IL

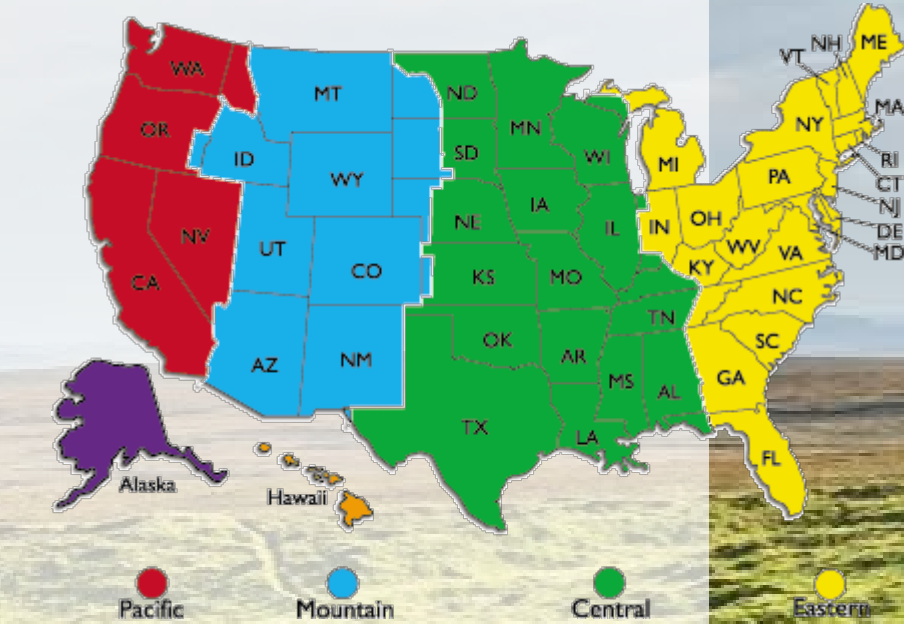
servicer edition



Connecting With You

Connecting With You Across Time Zones

- ▶ We're now 24 x 7 x 365 across 7 time zones
- ▶ Next up:
 - What's the Fed doing with real-time payments?
 - Daily backups by time zone
 - Sunset of RDC batch – RDC IQ is now the standard





- ▶ Over the past 1 ½ years, the Innovation Center in Las Vegas has grown to house 14 network employees
- ▶ Provides support to the western region and after-hours support to CUs in the east
- ▶ A network resource for credit unions and partners
 - Give us a call when planning your next event!

Speaking of Events...
Mark Your Calendars!

2022 CEO STRATEGIES WEEK

Tuesday & Wednesday
November 15 & 16, 2022

at the
M Resort Spa Casino
in Las Vegas, NV



Firing Up New Regional Events

- ▶ Our goal for 2022 and 2023 is to make more connections with you
- ▶ New groups are forming in multiple areas
- ▶ How can we get active with your community?

Firing Up Focus Groups

Conversations on...
Fraud *NEW!*

Conversations on...
Imaging *NEW!*

Conversations on...
**Accounting/
Back Office**

Conversations on...
Data *NEW!*

Conversations on...
Bill Pay *NEW!*

Conversations on...
**Teller/Member
Services** *NEW!*

Conversations on...
**Serving Business
Members** *NEW!*

Conversations on...
**Deposit
Operations** *NEW!*

Conversations on...
Compliance

Conversations on...
Cards *NEW!*

Conversations on...
Education *NEW!*

Conversations on...
Xpress Teller

Conversations on...
**Member
Experience** *NEW!*

Conversations on...
Lending *NEW!*

Conversations on...
Collections



Firing Up New Ways to Use Advisory Boards

“Much like a board of directors, an advisory board is a fixed roster of participants selected to work directly with a CU*Answers management team to provide leadership for a particular CUSO business unit.”

Firing Up New Ways to Use Advisory Boards

- ▶ Our prototype: the BizLink Advisory Board

Format is evolving:



- **CEO Advisory Board** for overall direction
- New **Focus Group** for deeper dives into the details

- ▶ And the next new Advisory Board is...?

Deep Dive on Cybersecurity

Dave Wordhouse, EVP Technology

Matt Sawtell, VP Managed Technology Sales



What Do We Do?

 **CU*ANSWERS**
Network Services

AdvantageCIO

- ▶ CU*Answers Network Services
 - Managed Technology Services – we're your IT department
 - Core competencies
 - CU experts with an emphasis on compliance and cyber
- ▶ Advantage CIO
 - Need a Chief Information Officer?

What *Don't* We Do?

 **CU*ANSWERS**
Network Services

AdvantageCIO

- ▶ Understanding what CNS *doesn't* do is just as important as understanding what we do
- ▶ Realtime detection and response is a specialization
- ▶ So is forensic work
- ▶ We encourage evaluation and having these services as part of your overall cyber approach

What Have We Learned?

 **CU*ANSWERS**
Network Services

AdvantageCIO

- ▶ Dodging the bullet is no longer reality
- ▶ Responding to events is time consuming
- ▶ Our role alongside your credit union and the incidence response team is very involved

Best Practices

 **CU*ANSWERS**
Network Services

AdvantageCIO

- ▶ Review your patch management program
- ▶ Regularly phish test your employees
- ▶ In the cloud? MFA should be mandatory!
- ▶ Reduce administrator accounts on your network
- ▶ Don't store member data – but if you store it, encrypt it
- ▶ Review network management reports

Giveaway Alert!



 **CU*ANSWERS**
Network Services

AdvantageCIO

**1 Free
Ransomware
Assessment**

\$4,800 value!

**Stop by the CNS/ACIO
booth at the next break
to enter to win a free
cyber assessment!**

**1 Free
Cybersecurity
Assessment**

\$9,600 value!

An underwater scene featuring a vibrant coral reef in the foreground with various types of coral in shades of red, orange, and purple. Numerous small blue fish are swimming throughout the water. The background shows the surface of the water with sunlight filtering through, creating a shimmering effect. The overall color palette is dominated by deep blues and greens, with the warm colors of the coral providing a strong contrast.

Deep Dive on Multi-factor Authentication

Brian Maurer, EVP Software Development

Multi-factor Authentication (MFA)

- ▶ We're attacking this in two channels:
 - **Members** (online banking, call center validation)
 - **Staff** (ours and yours) logging in to a LAN or CU*BASE
- ▶ We're still in the design phase
 - Talking to vendors such as Daon
 - Whatever solution(s) we design, CUs will be able to choose how and where to implement

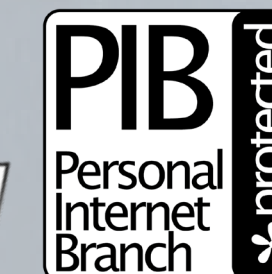


Learn more: cuanswers.com/resources/kitchen

Multi-factor Projects for Members

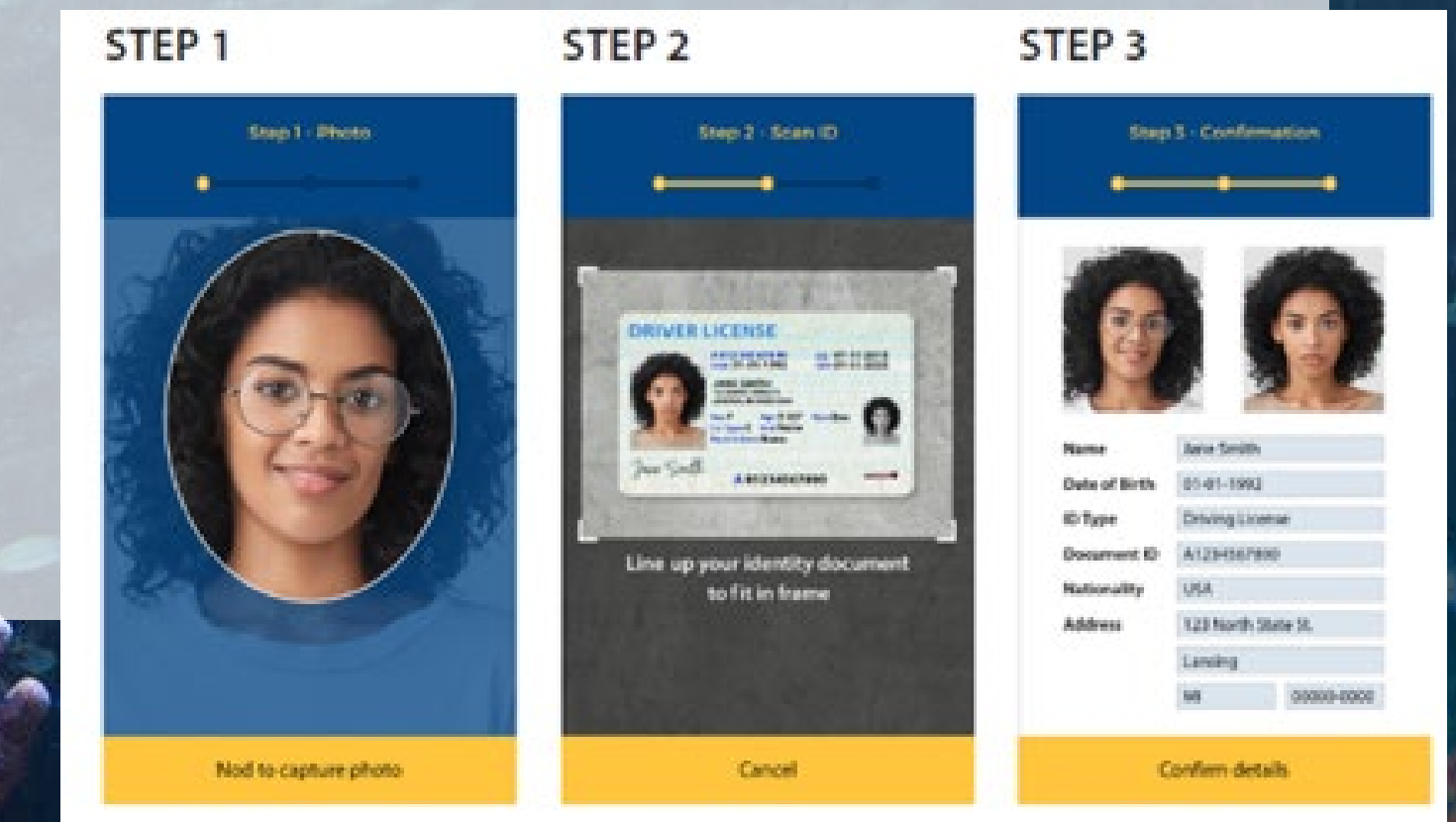
- ▶ MFA for personal info updates in online/mobile banking
- ▶ MFA for using P2P
 - TBD: Enrollment only? Transfers only? Both?
- ▶ MFA for password resets

Don't forget
about PIB!



MACO for MOP: Digital Identity Proofing

- ▶ Expanding our use of Daon's IdentityX Onboarding feature
- ▶ Secures a 1-year MACO license for the member
- ▶ Uploads the ID to CU*Spy
 - We're working on a solution for in-house vaults



➔ Learn more: cuanswers.com/resources/kitchen

A lush green forest with tall trees and a dirt path where two hikers are walking. The scene is vibrant with various shades of green, from deep forest greens to bright, sunlit foliage. The path is narrow and appears to be made of dirt and small stones. Two hikers, a man and a woman, are seen from behind, walking away from the camera. They are wearing backpacks and hiking gear. The overall atmosphere is serene and natural.

Deep Dive on Audits & Compliance

Jim Vilker, VP Professional Services, AuditLink

Marvin Johnson, AuditLink Manager

Are you monitoring for abnormal activity?

- ▶ AuditLink can help you get the most of out the **CU*BASE Abnormal Activity Monitoring** tool set
- ▶ Choose from 30 pre-loaded patterns from AuditLink
 - Check out the new step-by-step guide
 - We can even configure your patterns for you!

Learn more: store.cuanswers.com/store/auditlink

What else has AuditLink been up to?

**1 FREE
VM Implementation**

A \$3,000 value

**Stop by the
AuditLink booth and
enter to win!**

- ▶ Vendor Management services
 - Guided by the 7 Cooperative Principles
 - Reviewing an SSAE-18 and financial statements isn't enough
- ▶ New resources on our store and AuditLinkSuite.com
- ▶ Connecting with CUs
 - Monthly Fraud Focus Group
 - Conversations on Compliance

AuditLink

Learn more: store.cuanswers.com/store/auditlink

What's next for AuditLink?

- ▶ AAM next phase
 - Studying the most effective patterns
 - Stop, no-go
 - Cross-channel patterns
- ▶ BSA monitoring enhancements
 - Manufacturing time

Trends in NSF & Courtesy Pay fees

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WEDNESDAY
JANUARY 26, 2022

CUtoday.info
FOR BETTER CREDIT UNIONS TOMORROW

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Daily News Bulletins

THE news | From Frank | THE corner | THE market | THE neighborhood | THE 'tude | THE vault | Web Seminars

New Filene Report Urges a Rethinking Around Non-Interest Income and Overdraft Programs

01/17/2022 04:57 pm

United FCU Joins Growing Number of CUs Eliminating Fees

The fifth largest Michigan credit union announces new fee eliminations going into effect in April.

By **Michael Ogden** | January 25, 2022 at 03:04 PM

CFPB Research Shows Banks' Deep Dependence on Overdraft Fees

Overdraft and Non-Sufficient Fund Penalties Made up Two-Third of Reported Fee Revenue

DEC 01, 2021

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Search [] f t in **Credit Union Times** Sign In REGISTER

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SN The difference is in THE DETAILS
For more info visit StateNational.com

News

American Airlines FCU to Pay \$1.5 Million to Settle Overdraft Fee Dispute

California woman who filed the class action lawsuit will be paid a \$15,000 service award.

By **Peter Strozniak** | August 11, 2021 at 02:08 PM



FOR IMMEDIATE RELEASE
November 16, 2021

AAACU Helps Members Save Over \$675,000.00 By Slashing Overdraft Protection Program Fees

Alpena Alcona Area Credit Union announces that it has once again reduced its non-sufficient fund (NSF) and overdraft protection service fee (ODP) to \$13.75 effective on December 1, 2021

Cross-team giveaway!

**1 FREE
Courtesy Pay
Program Analysis**

A \$1,500
value brought
to you by:



**Stop by the Asterisk
Intelligence booth
and enter to win!**

**1 FREE
NSF/ANR Config
Review**

A \$500 value
courtesy of:

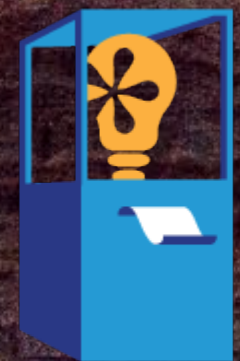
AuditLink

**Stop by the
AuditLink booth and
enter to win!**

Deep Dive on Analytics Booth

Keegan Daniel, VP Professional Services

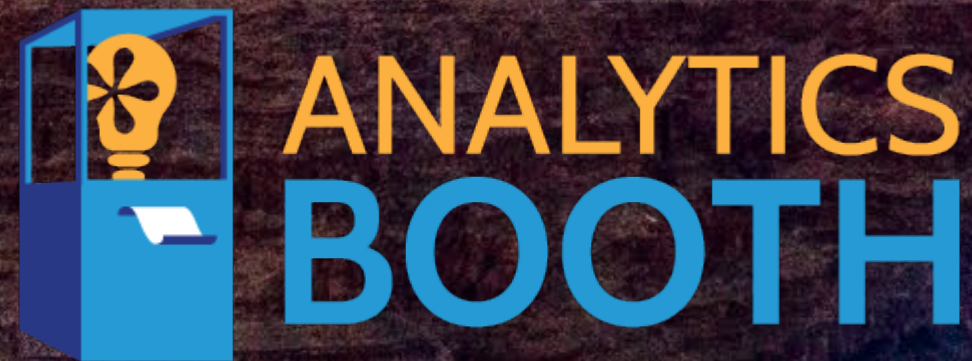
Josh Peacock, Product Development Manager



ANALYTICS
BOOTH

What should CUs know about Analytics Booth?

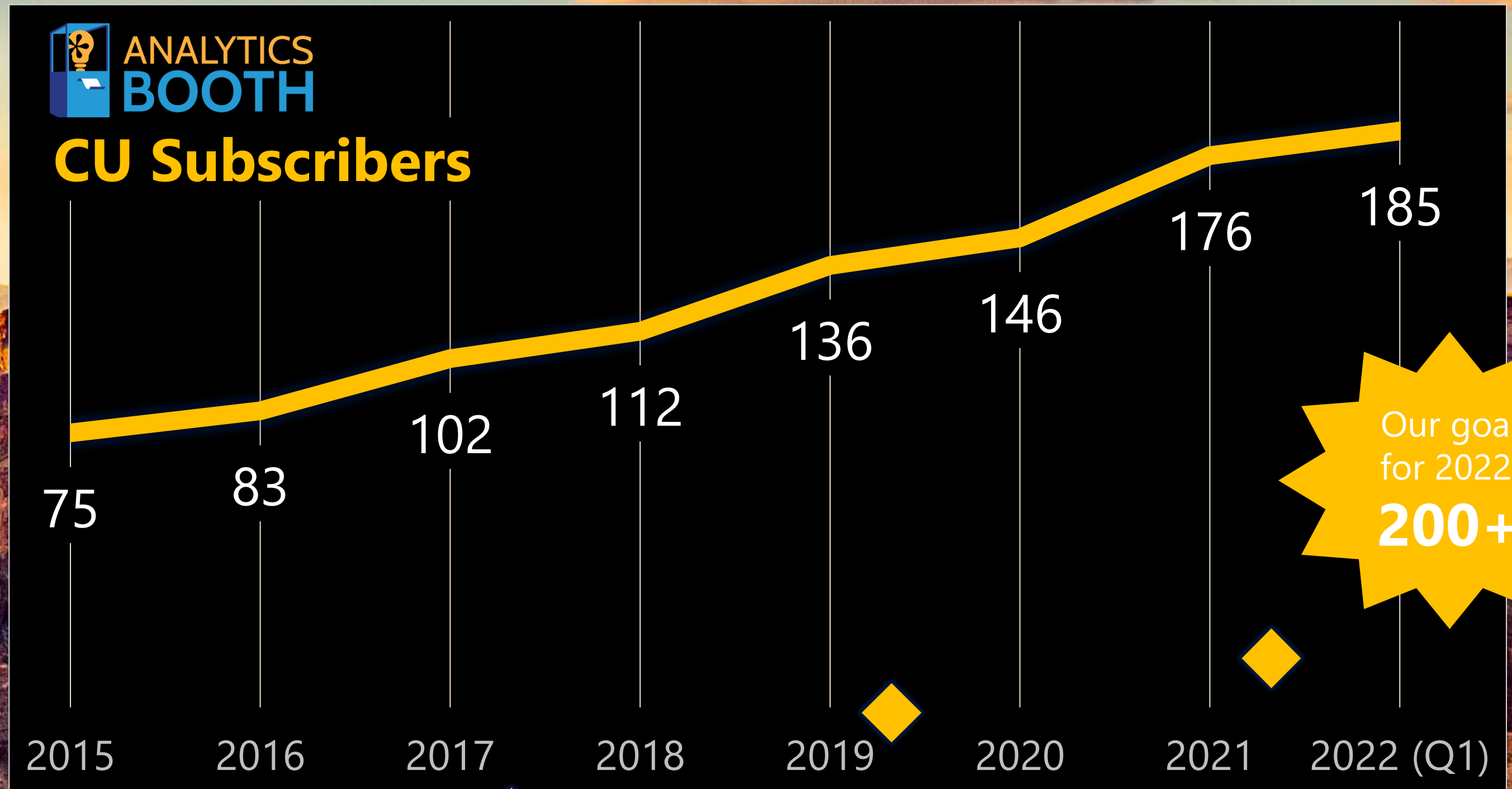
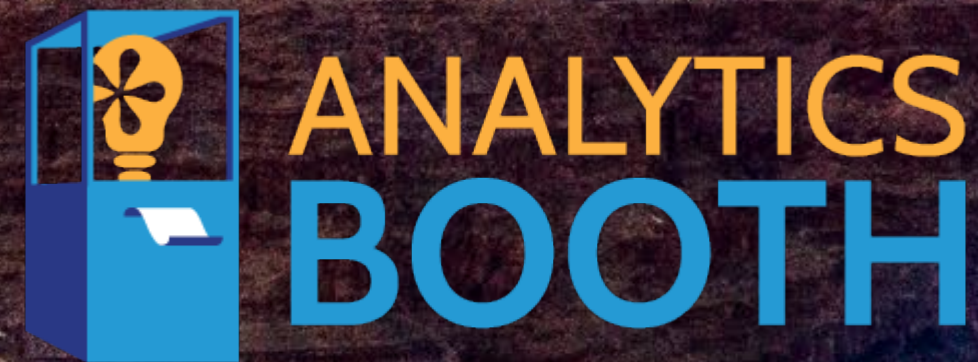
- ▶ Web-based tool, log in from anywhere
 - Trending graphs
 - Daily alerts
 - Analysis dashboards
- ▶ For CU teams, board members, auditors and examiners
- ▶ “Deep Dive” training weeks



Changes to the AB Pricing Model

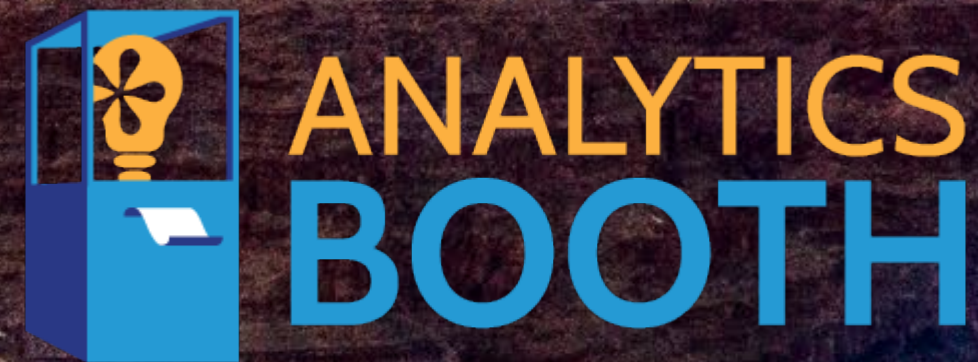
# of Mbrs	Analytics Booth Subscription Fee	CUs Affected	% of CUs
1 – 2,999	\$0 / month	115	35%
3,000 – 7,999	\$50 / month	108	33%
8,000 – 11,999	\$100 / month	39	12%
12,000 +	\$150 / month	64	20%

Subscribers



What's next for Analytics Booth?

- ▶ Continued investments in dashboard look and feel
- ▶ Changes in how we collect data
- ▶ Refreshing the Static Pool Analysis toolkit
- ▶ Infrastructure investments in reports and alerts



Average Number of Files Imported Into the Analytics Booth Data Warehouse

Daily: 6,320

Monthly: 192,233

Quarterly: 576,700

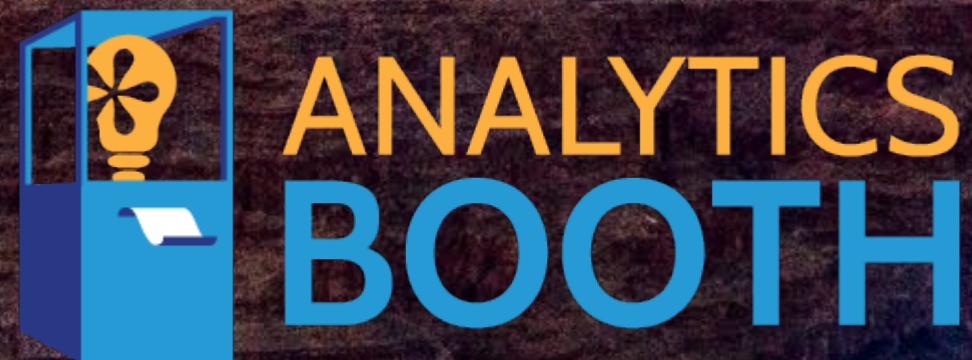
Yearly: 2,306,800

Another giveaway!

**Sign up for
Analytics Booth
today and
Get your first
90 days FREE!**

Up to a
\$450 value!

**Stop by the Asterisk
Intelligence booth
to sign up!**





Deep Dive on Earnings Edge

Keegan Daniel, VP Professional Services



What can we do for you?

- ▶ ACH On-Demand Posting
- ▶ Election Management
- ▶ CU*BASE Budget Tool Consulting
- ▶ Cross Sales/Next Suggested Product
- ▶ Member Statement Styles
- ▶ Check Order Integrations
- ▶ Patronage & Bonus Dividends
- ▶ Branch Reassignment
- ▶ Product tune-ups
 - Fees, Marketing Clubs, Online Services, Savings and Checking Products

Post-Release Validation (PRV)

- ▶ PRV watches key system changes that might affect a CU's bottom line or other critical data
 - Credit unions are encouraged to get involved!
- ▶ Auditing DHD projects
- ▶ Auditing billing for CMS and other teams

Xpress Teller Update

- ▶ Enhancements in 22.05:
 - Teller transaction limits
 - Bonus Zones (Tracker notes)
- ▶ Coming in 22.10:
 - \$0 memo trans for cashed checks
 - Edit secondary trans descriptions
 - Print checks/money orders at remote branch printer
- ▶ Next up:
 - 3rd instrument type (cashier's checks, etc.)

More giveaways!

**1 FREE
Xpress Teller
Consult/Config
Service**

\$1,000 value!

**Stop by the Earnings
Edge booth at the
next break and
enter to win!**



The Robert H. Mackay Leadership Award

EST 2005



Randy Karnes



Deep Dive on Lending

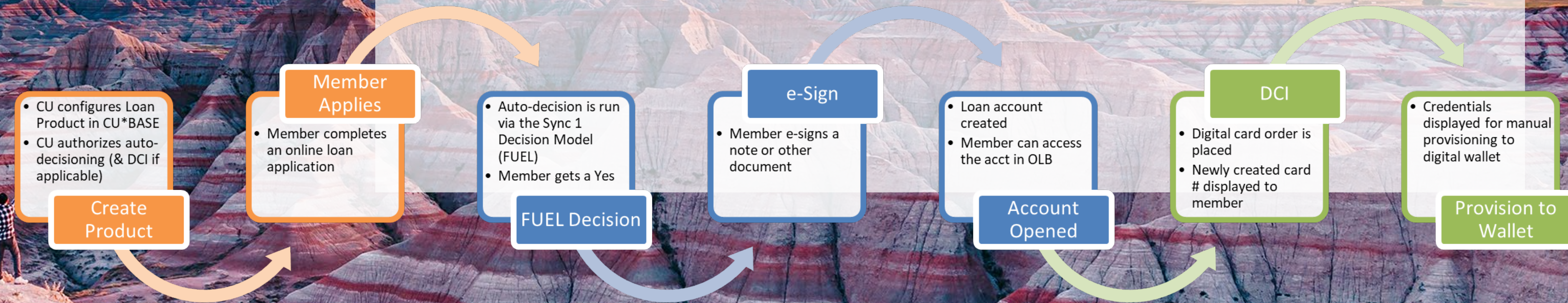
Online Loan Offers

- ▶ 1Click Unsecured Loans and LOCs (21.12)
 - 28 CUs have made offers so far
 - Madison County saw \$447K of unsecured loans in less than two weeks!
- ▶ Savings-secured Loans (22.05)
 - CD-secured loans laid the foundation for eSigning
 - Savings-secured just rolled out, pretty quiet so far

Online Loan App Auto-Approvals & Fulfillment



- ▶ Think "1Click On Demand"
- ▶ Member applies, gets a yes, e-signs, and immediately gets a loan!



Learn more: cuanswers.com/resources/kitchen

Sync 1 and FUEL

- ▶ Sync1 is our new partner for credit report pulls, replacing Zoot
 - A cooperative offering many benefits now and into the future
- ▶ FUEL is our own decision model, via Sync1
 - Replaces 247 Lender
 - A foundation we can build on, a partner we can evolve with



Online LOS Enhancements v2.0

- ▶ Project 1: Managing the Queue
 - Routing for incomplete apps
 - New payment calc for LOC / CCs
- ▶ Project 2: A New Online App
 - For authenticated members and non-members
 - CU customization options via CU Publisher
- ▶ Project 3: Online Approvals and Fulfillment

Participation Loans Enhancements

- ▶ We're enhancing the existing **Package Loans to be Sold** tool
- ▶ Once you've finalized the group of loans for sale, you'll just click a single button to automatically create the participation records in CU*BASE
- ▶ In development now, targeted for the 22.10 release



**Don't forget about our
OTB interfaces!**

- ▶ OTB credit cards
 - FIS (TBS, Base2000, Payments One), Fiserv (adding Optis), PSCU, and CO-OP
- ▶ OTB mortgages and other loans
 - Kasasa, Midwest Mortgage, Member First Mortgage, IBS Commercial Loans, Truhome, BLG, Mortgage Center
- ▶ OTB investment/savings accounts
 - Devenir (HSA investments)

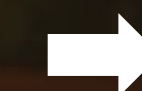
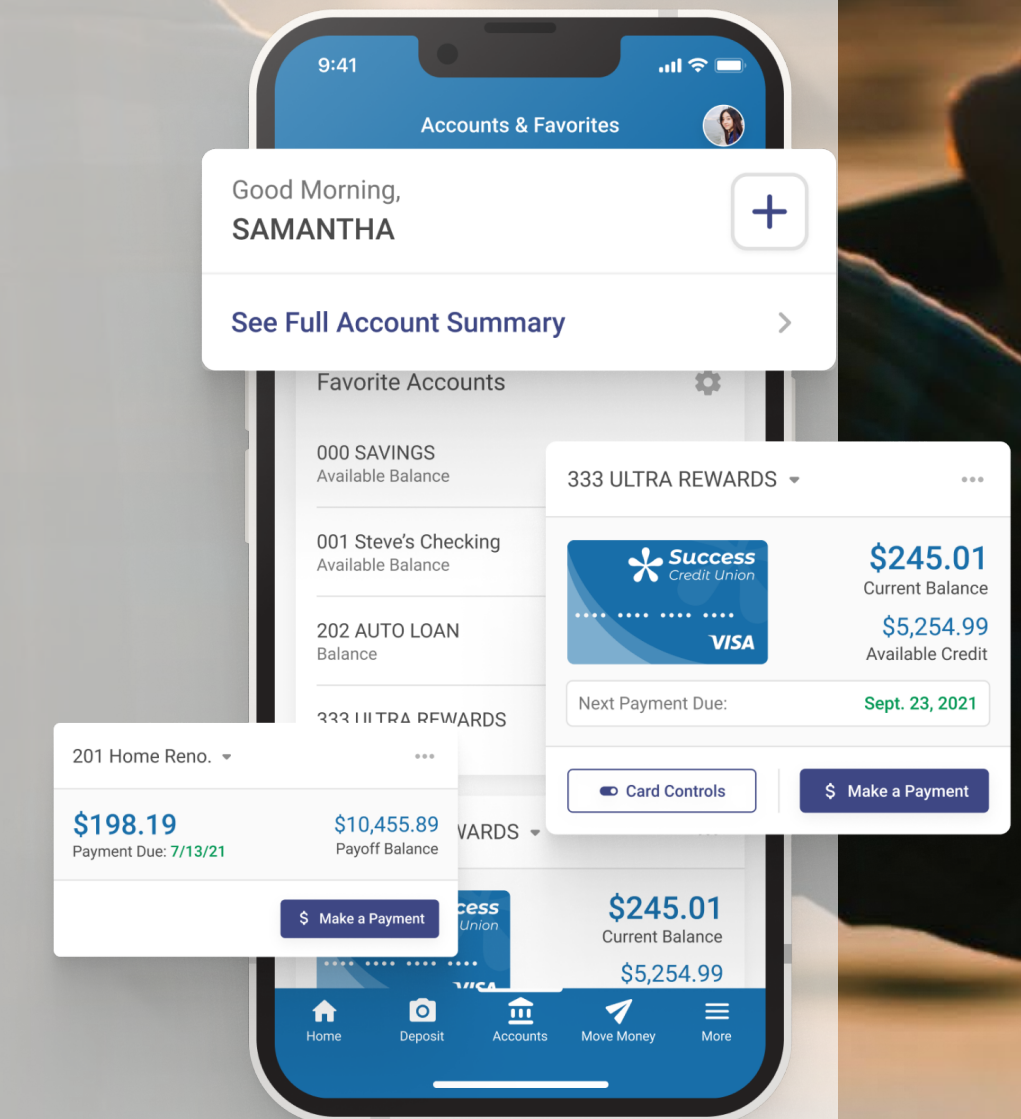


Online and Mobile Banking News

Kristian Daniel, VP MTG Sales & Business
Development

Mobile 6.0 is available now!

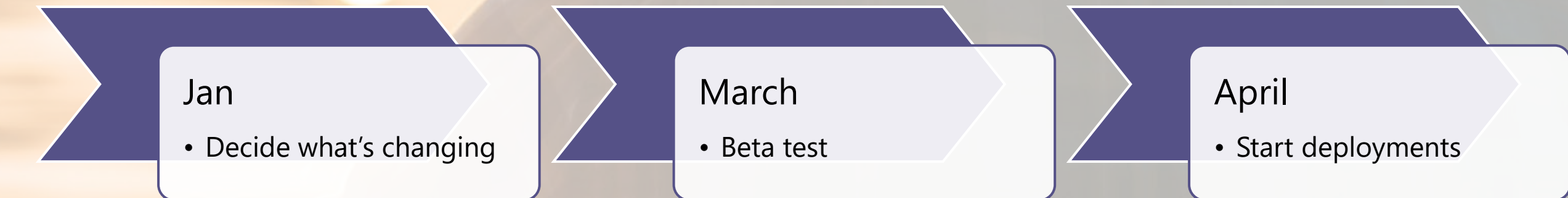
- ▶ New card widget
- ▶ New loan widget
- ▶ New welcome widget and improved full account summary
- ▶ See card-specific activity via Card Controls
- ▶ Sign-in prompts about MACO options



Place your order: store.cuanswers.com

Change to the mobile app release process

- ▶ A new disciplined schedule for deployments:



- ▶ Pick your month (Apr to Sept)
 - That'll be your month next year...and every year

What else?

- ▶ CU Publisher Self-Service
- ▶ RDC Auto-Enrollment – coming this fall
- ▶ Using the Form Generator to create custom online forms
- ▶ LoanPay Xpress integration within OLB/Mobile

Yep, another giveaway!

**5 FREE
Pay Anyone 1.0
Deployments**

A \$1,500 value!

**Stop by the MTG
booth and enter to
win!**

**2 FREE 6-month
subscriptions to
Mobile Manager**

A \$300 value!

**Stop by the MTG
booth and enter to
win!**

A person wearing a blue long-sleeved shirt, yellow shorts, a white helmet, and a large yellow backpack is riding a mountain bike down a steep, rocky trail. The rider is positioned in the lower foreground, looking towards the right. Below the trail, a wide, turquoise lake stretches across the valley floor, bordered by steep, rocky mountainsides. The mountains are covered in sparse vegetation, including small evergreen trees and patches of yellow grass. The sky is clear and blue. The overall scene is a dramatic, high-altitude mountain landscape.

Deep Dive on EFT

Heather French, VP Client Interactions

Key EFT Projects Since We Last Met

- ▶ FIS Payments 1 move
- ▶ Card randomization
- ▶ APBatch4
- ▶ Expanded EFT data stored in transaction records
- ▶ MCC Group configs
 - New dashboard in 22.05!
- ▶ Credit Card Cash Back enhancements
- ▶ ISO Port Monitoring
- ▶ Sunset of Fiserv Legacy, move to Fiserv Epoc
- ▶ 8-digit BINs
- ▶ Business credit card statements



Using MCC Codes, Other New Data in TRANSx

▶ Available now:

- Click an EFT transaction alert and the app will show activity only for that card – get it now in in Mobile 6.0!
- Card Activity Optics dashboard

▶ In development:

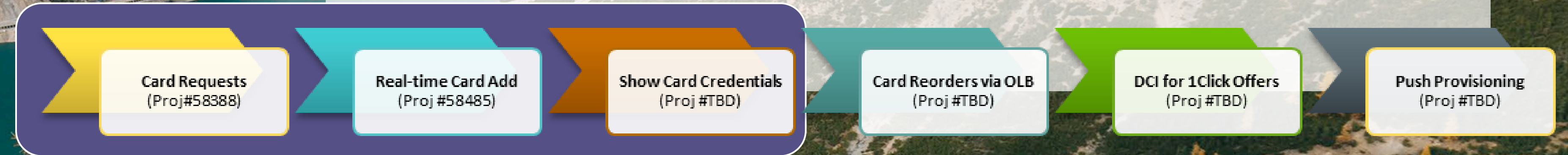
- Credit Card Cash Back rewards by MCC Group
- Card Activity Rebates by MCC Group
- Credit card rate promos by MCC Group
- Last 4 digits of card # on statements & OLB

What's next?

- ▶ Temporarily change a member's debit card limit
- ▶ Send new card orders to a different, temporary address
- ▶ VISA MAPS online platform for debit and credit
- ▶ COOP online platform for debit ("Optis")

Digital Card Issuance (DCI) & Provisioning to Wallet

- ▶ Will support DCI for:
 - New ATM/debit and credit cards (*new card #*)
 - Card replacements (*hot-card the old one, issue a new card #*)
- ▶ First vendor will be CO-OP
- ▶ Attacking the project in phases:



➔ Learn more: cuanswers.com/resources/kitchen

DCI for 1Click Credit Card Offers



- ▶ Attaching DCI and manual provisioning to the existing 1Click Credit Card Offers feature
 - Actual provisioning to wallet must be done via the mobile app, but the card will be digitally issued and the card # available immediately, even via desktop/mobile web

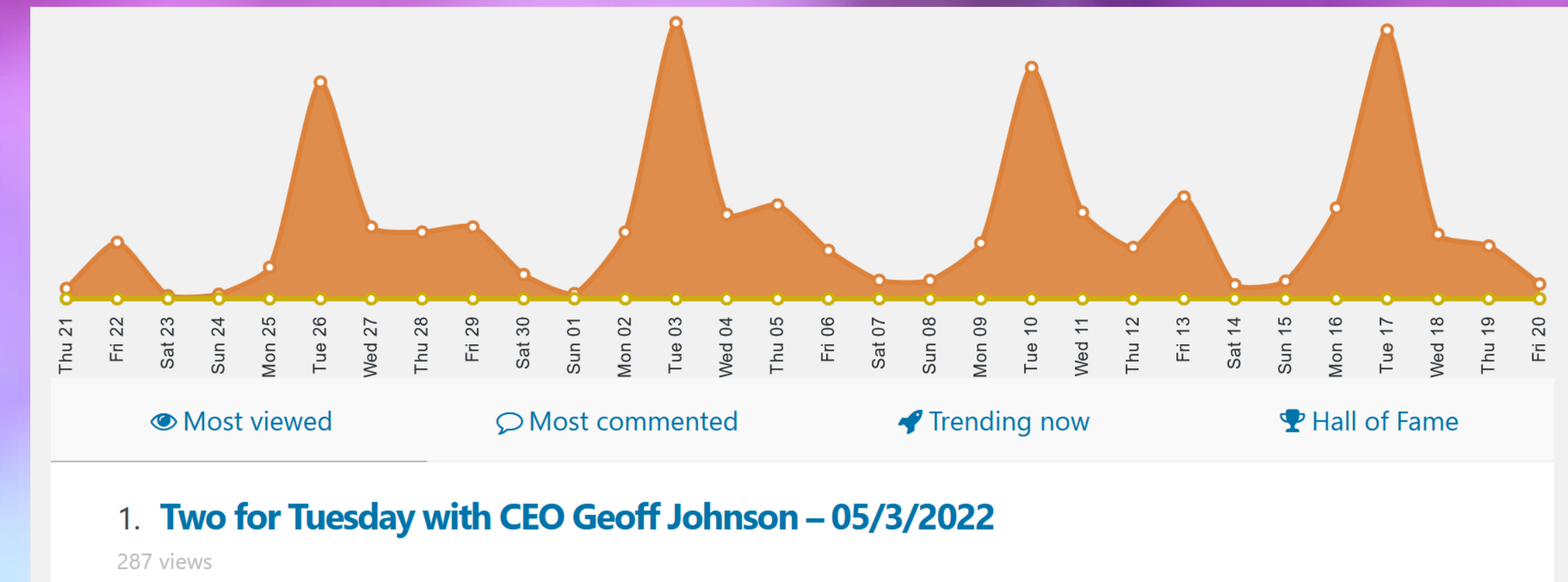


Learn more: cuanswers.com/resources/kitchen

**And now it's time
for another...**

TWO FOR TUESDAY
with Geoff Johnson

- ▶ 36 episodes aired since October
- ▶ Average of 250 hits per video
- ▶ Tuesday has definitely become our most viewed day of the week!





Deep Dive on Imaging Solutions

John Beauchamp, VP of CMS Teams

Update on ITM Projects: Hyosung

- ▶ In beta now at RVA Financial FCU, Peninsula FCU & Bluestone FCU
- ▶ At RVA, over a 4-week period:

Channel	Trans Count	% of total
Self-Service	5,561	89%
Video Assistance	715	11%
Total	6,276	
After Hours	1,901	30%

Place your
order in the
store today!

➔ Check out the case study: [cusomag.com](https://www.cusomag.com)



Update on ITM Projects: NCR

- ▶ Beta target is 4th calendar quarter 2022
- ▶ Champions Honor CU & Frankenmuth CU
- ▶ Honorable mention to Bill Burke

- ▶ What's next?

Native Receipts

- ▶ We'll write it, we'll own it, we can innovate on it
- ▶ New features, new technologies
- ▶ Moving away from receipt print sessions
- ▶ Modernized look and feel, customization options



The next chapter for Virtual Strongbox (VSB)

- ▶ VSB has been our answer to “can you email me the receipt?”
 - Still available, but a change is coming
- ▶ Adding new doc types to online/mobile banking
 - Receipts and forms
 - Free to CU*Spy users
 - In-house vaults will require some setup



What else is Imaging Solutions up to?

- ▶ Xpress Teller on-screen image editing tool
- ▶ Weaving more imaging tools into CU*BASE screens and workflow
 - Request a document
- ▶ Color photo IDs in CUBASE GOLD
 - Join our Enhanced Online Vault client community!

A person is ziplining through a dense, lush green forest. The person is wearing a blue shirt and dark pants, and is suspended from a wooden platform by a rope. The forest is filled with tall trees and thick foliage, creating a vibrant green backdrop. The zipliner is moving from a higher platform on the left towards the right side of the frame. The overall scene is bright and natural, capturing an outdoor recreational activity.

Deep Dive on User Experience Design

Ken Vaughn, VP MTG Product Design/Development

Dawn Moore, VP Writing Team/Product Design

A person is ziplining through a dense, green forest. The person is wearing a blue shirt and dark pants, and is suspended from a wooden platform by a rope. The background is filled with tall trees and thick foliage. The scene is captured from a high angle, looking down at the person as they glide through the air.

A new team and flow for UI design

Projects we've done using this new technique:

- ▶ New online banking
- ▶ Xpress Teller
- ▶ 1Click Offers
- ▶ AI Engaged
- ▶ Savings-secured CDs
- ▶ Native Receipts
- ▶ MFA for Personal Info updates
- ▶ BizWatch for ACH

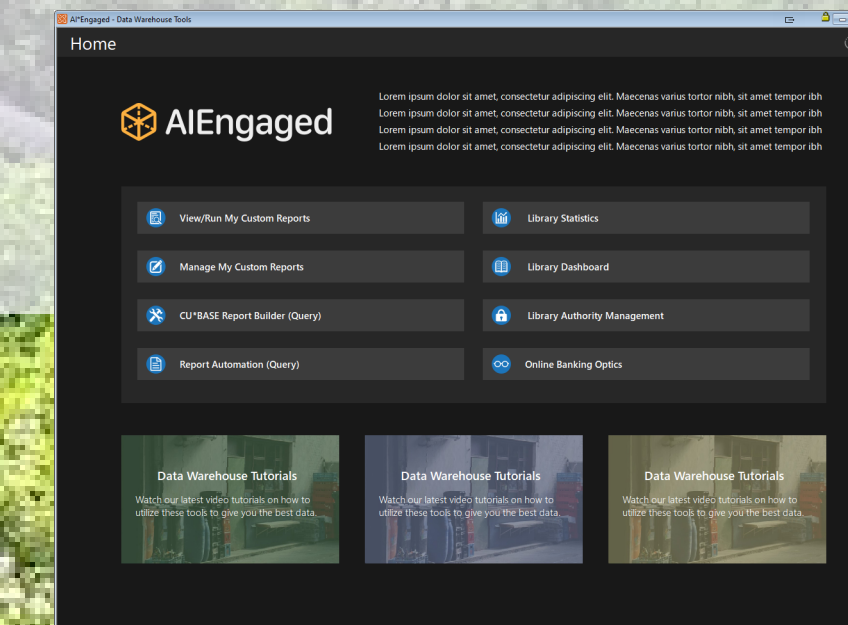
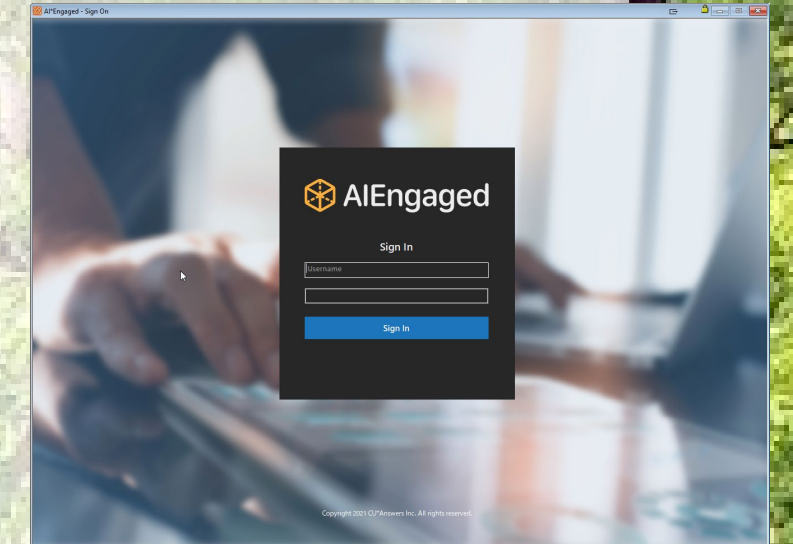
A person is ziplining over a dense green forest. The person is wearing a blue shirt and dark pants, and is suspended from a wooden platform by a rope. The background is a lush green forest with many trees. The zipline is a thick rope that runs diagonally across the frame. The person is in the middle of the zipline, and the rope is attached to a wooden platform above them. The forest is very dense and green, with many trees and bushes. The sky is not visible, but the lighting suggests it is daytime. The overall scene is one of adventure and nature.

What's are your designers up to now?

- ▶ **BizLink 247** desktop & mobile web module designs
- ▶ Mobile 6 for **BizLink 247** with MACO & RDC
- ▶ Online/mobile "Layout 2"
- ▶ PIB 2.0 modules
- ▶ New online loan application
- ▶ Loan Pay 1.0

CU*BASE GOLD User Interface

- ▶ Working with Rocket on a proof of concept for a new user interface for CU*BASE
- ▶ Phased-in approach (a “module” at a time) so we can ease it in



Manage Custom Report Definitions

Home

Data Warehouse: QY

Jump to name... Run Report View Tables Copy Delete Preview Report Rename Work With

Search for: Search for Description containing... Table name... Created by... Refresh

NEW REPORT

DATE CREATED FROM: DATE CREATED TO: LAST CHANGED FROM: LAST CHANGED TO: LAST USED

Query Name	Query Description	Created By	Date Created	Last Changed	Last Used
ACCOUNTS		MREW	Jan 04, 2017	Jan 04, 2020	May 11, 2021
ACCTNGRPT		SARAHZ	Apr 19, 2021	Apr 19, 2021	Apr 26, 2021
ALLLOANS	listing report auto	SARAHZ	Apr 19, 2021	Apr 19, 2021	Apr 26, 2021
ATESTFL1	RUN - list of members	AHAWKES	Nov 19, 2019	Jan 04, 2020	Apr 26, 2021
ATESTFL2	CHG - final file only reg e charges	AHAWKES	Nov 19, 2019	Jan 04, 2020	Apr 26, 2021
AUDCCSUM	count logins for each account base	AHAWKES	Nov 07, 2019	Jan 04, 2020	Apr 26, 2021
AUDCCSUM2		AHAWKES	Nov 07, 2019	Jan 04, 2020	Apr 26, 2021
AUTOLOANS	test for beta	SARAHZ	Apr 01, 2021	Apr 02, 2021	Apr 26, 2021
BOAYTOGAY	testing	SARAHZ	Apr 19, 2021	Apr 30, 2021	Apr 30, 2021
CHARGEOFF2	Text CHARGEOFF2	DONALDP	Mar 02, 2015	Jan 04, 2020	Apr 01, 2021
CLICK		MARYV	Jul 01, 2021	01/00/0000	01/00/0000
COPY2	DELETE LATER	AHAWKES	Nov 19, 2019	Jan 04, 2020	Apr 26, 2021
CREDIT	test	SARAHZ	Apr 19, 2021	Apr 26, 2021	Apr 26, 2021
DATABASE	database search assistant	KSORENSEN	Dec 21, 2017	Jan 04, 2020	Feb 22, 2021
EXTDELX	Test EXTDELX	DONALDP	Mar 02, 2015	Apr 19, 2021	Apr 19, 2021
FISERVAL	Creates Fiserv balances in EMPNUC	AHAWKES	Sep 02, 2021	Sep 10, 2021	Sep 10, 2021
FISERVAL2	FISERV Balances - with FCUA	AHAWKES	Sep 02, 2021	Sep 10, 2021	Sep 10, 2021
FISERVUA	CLPA Balances - Creates FCUA file	AHAWKES	Sep 02, 2021	Sep 10, 2021	Sep 10, 2021



Wrapping Up the Day

Geoff's Top 10

Don't miss out on these!

CLR Path
Decision Advisor

FUEL Decision
Model

Integration:
Open Lending

1Click Offers

Integrations:
GAP Insurance
(CUNA & Frost)

Text Banking

OTB Integrations

Card Activity
Rebate / Rewards
Programs

Online Elections
via **It's Me 247**

CUSOMag

Tonight's Stockholders Meeting

- ▶ See you at 5:30 (in this room)
 - 5:30 Cocktails
 - 6:00 Dinner
 - 7:00 Stockholders Meeting

CU*ANSWERS

Our Next Adventure

LEADERSHIP CONFERENCE 2022

THANK YOU FOR THE DAY!