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- Find new energy and enthusiasm for your role

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**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.
## Category Directory

### ALLOWANCE & PROVISION FOR LOAN LOSS
- QvikRate

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- Corporate Central CUSO – QuantyPhi
- VolCorp

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- Aux
- Business Lending Group LLC
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- Corporate Central CU
- Corporate One FCU
- Credit Union Loan Source
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- BranchServ
- CO-OP Financial Services
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- Rochdale Paragon Group

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- PSCU

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- Symitar
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- Payix Incorporated
- PSCU
- REPAY

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- Edge
- Social Assurance
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- Oak Tree Business Systems, Inc.
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- TCS BaNCS

### CONSULTANTS
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- REPAY
- TCS BaNCS

### CONTRACT MANAGEMENT
- Corporate Central CUSO – InterLutions

### CONTRACT MANAGEMENT & NEGOTIATION
- Sievewright & Associates

### CONVERSATIONAL BANKING
- SilverCloud

### CORE PROCESSING ADMINISTRATION
- AMI Information Systems
- CompuSource Systems, Inc.
- Corelation
- CRMNEXT INC
- CU-Interface mpowered
- ESP, Inc.
- FIS
- Fiserv
- Member Driven Technologies
- Prodigy
- Share One
- Symitar
- Synergent
- TCS BaNCS
- Trellance

### CREDIT CARDS
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- FIS
- Fiserv
- LSC
- Member Access Processing
- PSCU

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- 3SI Security Services
- AdvantEdge Digital
- Agility Recovery
- CNote
- CU Solutions Group
- E1tropy
- Harland Clarke
- InterLutions
- JMFA
- Kasasa
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- Newtek
- Office Depot
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- Illuma Labs
- Rate Reset
- SilerSky
- Tracesecurity
- Verafin
- Zest AI
- Zogo Finance

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

### DATA WAREHOUSE/DATABASE ADMINISTRATION
- Satcom Direct Data Center
- TCS BaNCS
- Trellance

### DEBIT CARDS
- CO-OP Financial Services
- CUNA Strategic Services
- FIS
- Fiserv
- LSC
- Member Access Processing
- PSCU
- Synergent

### DEPOSIT PRODUCT INNOVATION
- MANTL
- TCS BaNCS

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**The vision to push boundaries.**

**THE EXPERIENCE TO ACHIEVE LENDING BREAKTHROUGHS.**

Origence Enterprise Platform and Lending Solutions: Everything you need to achieve your objectives.
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#### Leadership Development/Succession Planning
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- Jack Henry
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- TCS BaNCS

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- Kevin D. Oden & Associates
- Rochdale Paragon Group

#### Lending Technology Systems & Platforms
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#### Liquidity Management
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#### Model Risk Management
- Kevin D. Oden & Associates

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

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Delivering Modern Membership℠ 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.

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

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

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- Glia

## VENDOR CONTRACT NEGOTIATIONS
- JMFA

## WEB DEVELOPMENT/MANAGEMENT
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- 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

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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.

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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.

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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.

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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.

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Kevin D. Oden & Associates (KDOA) is a financial model consulting firm specializing in helping clients to manage, validate, expand and optimize their modelling frameworks. KDOA is particularly focused on facilitating high quality, low-cost model risk management solutions for smaller institutions by enabling them to form consortiums around shared modelling interests (e.g. similar vendor models or common shared regulatory needs).
For more information, please contact us or visit our website

JMFA
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Houston, TX 77008
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www.JMFA.com

JMFA is a strategic alliance provider helping credit unions better serve their members with a fully disclosed overdraft solution, including the industry’s only 100% compliance guarantee, and save on vendor contract negotiations. Their comprehensive consulting approach and success monitoring will save you time and money, minimize regulatory scrutiny, identify new savings opportunities, and strengthen and protect income. With JMFA’s expertise, you can achieve measurable results.

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LSC®’s mission is to help credit unions compete. Our dynamic suite of product solutions includes debit, credit and CUMONEY® Prepaid Visa® Debit Cards and Gift Card programs. Grow and retain members with the convenience of all major ATM networks. LSC provides in-house customer service and an experienced Portfolio Development Team to help your credit union develop and manage successful marketing promotions. Advance with LSC.

LSC® has been a comprehensive payments provider since 1969. LSC’s prepaid cards are an easy, turn-key solution to offer members: minimal or no upfront investment, convenient online ordering and mobile loading, a low per-card cost, and free marketing tools. The CUMONEY® Prepaid Debit suite includes Everyday Spend—a reloadable debit card, Travel Money—a reloadable travel card, and Gift Cards—a gift alternative that can be used anywhere in the U.S. We also now offer virtual gift cards! This is part of our ongoing digital strategy designed to provide credit unions with the most updated and relevant products and services. LSC is a subsidiary of the Illinois Credit Union System and a CUNA Strategic Services provider for their CUMONEY card program.

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Member Access Processing offers industry-leading, full-service debit, credit, prepaid, ATM and mobile solutions. As the nation’s only aggregator of the Visa Debit Processing Service platform for credit unions, MAP is able to leverage our one-of-a-kind partnership with Visa to provide our clients the reliability, security, and service that no other provider can offer.

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Midwest Loan Services provides private-label mortgage subservicing to credit unions and CUSOs nationwide. Our unique approach and industry-leading technologies help our client partners retain members; reduce costs and ensure regulatory and operational compliance. No matter what your mortgage volume is, we’ll make sure you and your members receive the quality service you deserve. Further, by offering extensive private-label options and friendly, responsive service, Midwest helps extend your brand consistently and cost-effectively.

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MDT hosts the Episys® core platform from Symitar® to provide credit unions with a private cloud alternative for core processing and IT needs. The CUSO’s service-first, hybrid approach to outsourcing enables credit unions to boost efficiencies and security and reduce costs while maintaining a high level of control. In addition to hosting the Symitar® Episys® platform, MDT also hosts dozens of seamlessly integrated solutions to run the entire institution, including digital banking, payments, lending, security, continuity and regulatory services. Built by credit unions for credit unions, MDT takes care of technology so clients can forge stronger relationships with their members.

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Marquis provides marketing and compliance software and expertise to assemble, analyze and act on your data. We give you the confidence and insight to make informed decisions, achieve your vision and deliver measurable results. Marquis assembles data sources and provides the tools and expertise to analyze and understand member relationships and opportunities. Leverage the strength of our technology, consultants, analysts and creative services to extend your reach.

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For over 20 years, OutSolve has been dedicated to helping clients in the financial industry navigate the complexities of their affirmative action regulatory requirements. The Department of Labor's Office of Federal Contract Compliance Programs (OFCCP) has made its enforcement agenda clear, and our experts are well-versed in proactively reducing the risk of non-compliance for credit unions. We handle the full cycle of all required affirmative action components as mandated by Executive Order 11246 for women and minorities, Section 503 of the Rehabilitation Act of 1973 for persons with disabilities, and the Vietnam Era Veterans' Readjustment Assistance Act of 1974 for veterans. Even more powerful, OutSolve experts can also use your affirmative action compliance data to develop diversity and inclusion action plans for your credit union. Contact us to get started today.

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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.

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SD Data Center is built to protect and provide redundant access to your critical data. It’s part of a global network built to meet our customers’ needs for a secure, custom-engineered solution. The experts at SD Data Center partner with you to understand your business objectives, and deliver a suite of services tailored to your current operating environment and to support your future growth objectives.
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With decades of leadership experience in the financial services industry, Sievewright & Associates provides strategic insights and trusted advice to credit unions. Founder Mark Sievewright 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.

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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.

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The TCS BaNCS product suite is designed to enhance Credit Unions end member experience, enabling them to embrace open and innovative technologies that embody true digital engagement.

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ViClarity, formerly PolicyWorks, LLC is dedicated to helping regulated industries streamline their governance, risk and compliance (GRC) processes through automation and consulting services. Our award-winning technology provides an all-in-one platform to oversee risk, compliance, audit, governance and more. Simply put, ViClarity makes GRC management easier. To learn more about our technology and consulting solutions, visit www.viclarity.com.

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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.
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.

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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
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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

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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

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For more information, visit cuna.org/associatemembership