



Xtend is utilizing our communication business units to provide an **Opt In** solution that will help our credit union partners to address the recent Reg. E changes enacted by federal regulations. Our solution is designed to be ala carte so that you can leverage as much or as little of our call center, electronic communication and/or marketing services to help maximize your Opt In success. The information below outlines these ala carte services.

- With our Opt In solution, member data is retrieved from your CU*BASE core data processing solution using suggested data mining best practices to identify members that utilize Courtesy Pay privileges who are likely Opt In candidates. For our non-CU*BASE partners, Xtend will utilize the data you provide from your core system in an Excel readable format.
- Our Member Reach communication team has developed targeted letters, electronic messages and talking points to assist you in effectively communicating to your target audience (*electronic message delivery is not included for non-CU*BASE partners.*)
- For our CU*BASE partners, the Sales Tracker program will be utilized for support of your campaign. For non-CU*BASE partners, a data base is created on your behalf to track the progress of your program. All partners are provided results at the end of determined campaign period.
- The program schedule is determined based on the delivery channel(s) specified by the credit union. Xtend handles all of the details on your behalf, including mailing the letter, sending the electronic message and making phone calls (as applicable).
- Our Xtension Call Center offers a complete solution, from responding to your member inquiries to processing of the Opt In requests. Using a cooperative toll free hotline, members are greeted by our professional staff trained specifically to handle your Opt In calls. If Xtend is utilized for the outbound mailing, the member simply provides a unique validation code to the agent, which maintains confidentiality and allows for the processing of the request.
- Member responses are logged and reported to the credit union. For CU*BASE partners the Opt In request code will be properly maintained in CU*BASE.
- Once maintenance in CU*BASE is complete, a Miscellaneous Account Form that provides the required confirmation to the member can be transmitted to your credit union printer for subsequent mailing by your staff.

Although the process is designed to be a bundled solution, each service can be selected individually.

Description	CU*BASE Partners	Non-CU*BASE Partners
One-Time Set Up Fee	\$300.00	\$300.00—\$400.00 <i>Higher charge applies if credit union opts for Member Notification Letter</i>
Member Notification Letter	\$0.20 per letter <i>Plus postage</i>	\$0.20 per letter <i>Plus postage</i>
Electronic Messages	\$50.00 <i>Standard Email delivery fee applies for non-Member Reach clients</i>	N/A
Outbound and/or Inbound Phone Calls	\$1.00 per call	\$1.25 per call
CU*BASE Maintenance Fee	\$0.50 per member maintained	N/A

For more information on the Xtend Opt In solution or to get started, contact Julie Gessner at 1-800-327-3478 (x131) or jgessner@xtendcu.com