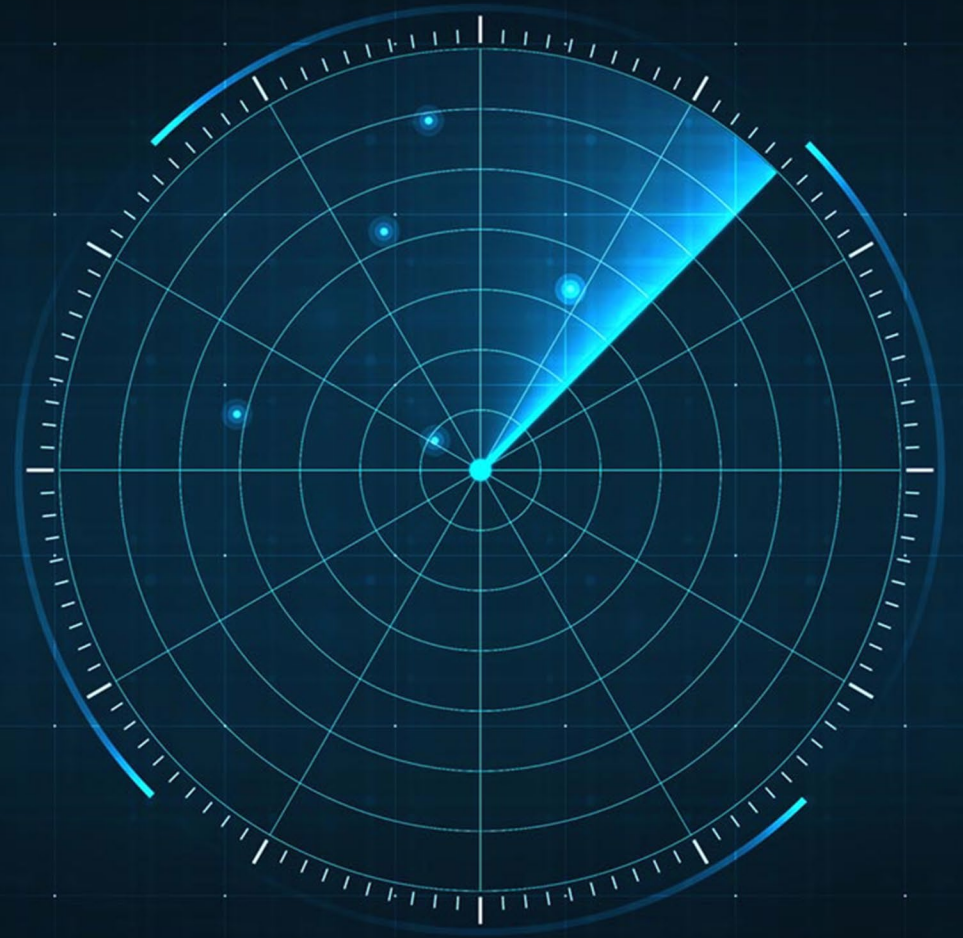


What should be on a CEO's radar for 2022?



2021 NATIONAL CEO
STRATEGIES WEBINAR
NOVEMBER 9, 2021



cuasterisk.com

CU*ANSWERS Staffing Notification

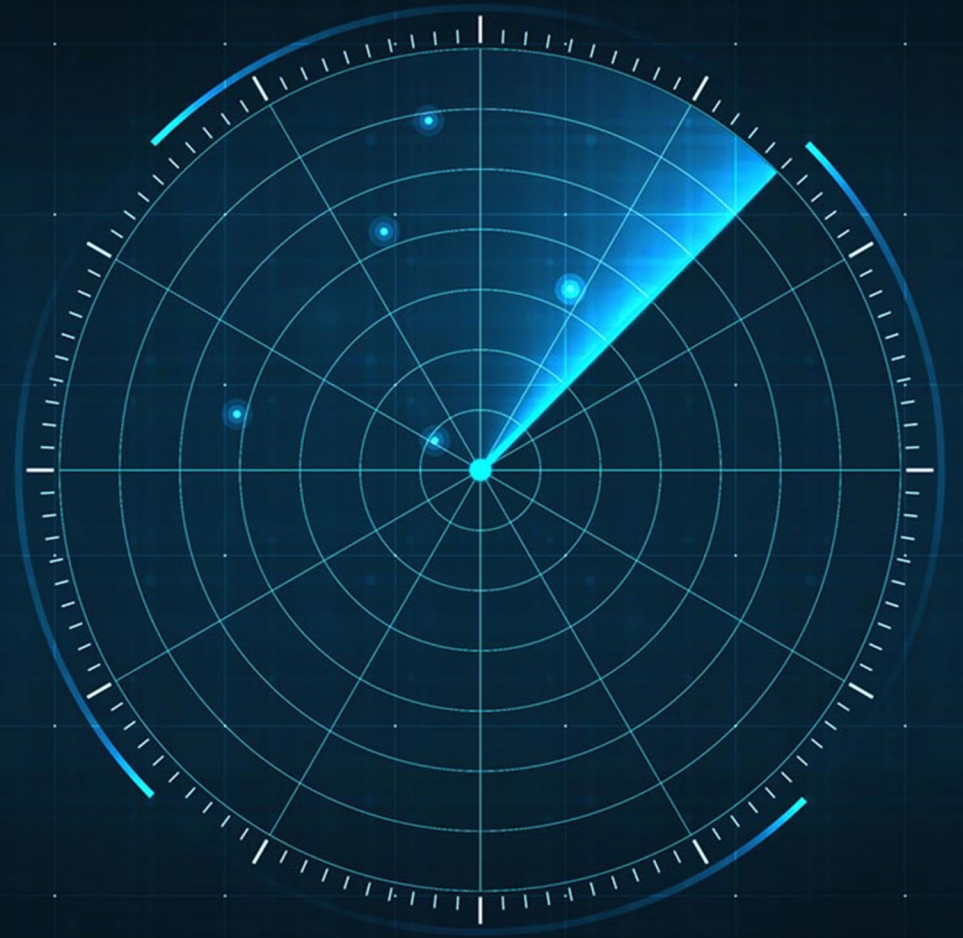


Geoff Johnson
CEO



Randy Karnes
Special Projects Coordinator

Randy's Dozen Tools You Should Be Using Now



1

Tools for Internet Retailers

DRIVING FOR ONLINE AND MOBILE CHANNELS TO BE MORE THAN INFORMATIONAL



FLEX LOANS



Vince, You've been approved!

Based on your status at Success Credit Union, you've been approved for up to a \$5000 right now

Dismiss

Claim



You Have Pending Deposits

Need that direct deposit faster? Some of your pending transactions are available to be posted early!

Not Now

Review

< Verify Stop Payment



A fee of \$27.00 will be charged to your account for this stop payment order. The order will expire after 6 month(s).

WHAT'S THE CEO STRATEGY?

In this economy, the trick to generating revenue is creating more opportunities to collect service income, priced below the level of consumer resistance

Sell everything you do for members, over and over again – truly go 24x7

Form Generator

Request Center

store.cuanswers.com

A NON-CREDIT REPORT APPROACH TO MAKING LENDING DECISIONS (AND MORE!)

- ➔ CLR Path uses the data about your members in CU*BASE (*FREE data you already own*)
- ➔ Get advice on lending decisions, opening new accounts, offering services...you name it
- ➔ Coming in 2022: Access to decision advice via Phone Op & Teller screens

WHAT'S THE CEO STRATEGY?

What you know about your members is the difference from all those who share data from the same 3rd-party sources

What will you do with it?

Using What You Know

FUEL Decision Model

Lender*VP

CUSTOMIZED DECISION MODEL USING CREDIT BUREAU DATA

- ➔ 3 templates: Direct, Indirect, Unsecured
- ➔ 20+ static attributes you can customize
 - ➔ Credit score, # of open trades, DTI, LTV, etc.
- ➔ Use FICO or VantageScore data

WHAT'S THE CEO STRATEGY?

Today's version of the holy grail: automated underwriting to speed lending decisions through a matrix of the CU's design

Improve your confidence in automated decisions with this new approach

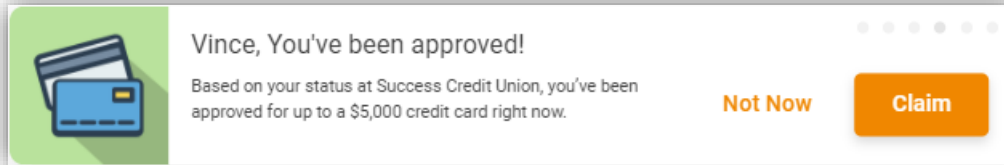
1Click Offers

The Introduction of Database Lending

Lender*VP

BUILD A MACHINE TO PUSH OFFERS TO YOUR MEMBERS, DAY IN AND DAY OUT

➔ 1Click Credit Card Offers *(available now)*



➔ 1Click Signature Loans *(coming in 21.12)*

- ➔ Get more small (and not-so-small) signature loans into your portfolio
- ➔ No employee needed
- ➔ Add a custom form for e-sign

WHAT'S THE CEO STRATEGY?

It's called 1Click to catch your attention, but it really should be labeled the launch point for a transformation in how CUs fund their futures...while doing the same for members

Database lending is a skill no one should underestimate



store.cuanswers.com/store/lendervp

CD-secured Loan Offers

Database Lending for Secured Loans

Lender*VP

SURPRISE YOUR MEMBER WITH A NEW SOURCE OF LIQUIDITY...THEIR OWN MONEY!

Pre-Approved Lending Workflow



COMING IN 2022:
Share-secured
Loan Offers

WHAT'S THE CEO STRATEGY?

The next step towards automating your entire set of loan offers to work seamlessly with 100%-automated member fulfillment

Creating opportunity instead of waiting for members to ask

store.cuanswers.com/store/lendervp

CU*BASE SUPPORTS A DOZEN LOAN ORIGATION INTEGRATIONS

- ➔ 153 CUs (roughly half of all CU*BASE clients) are working with these CU*Answers solutions
 - ➔ Coming with 21.10: **Open Lending**
 - ➔ Coming in 2022: Automate loan **distributions** from a 3rd-party LOS

WHAT'S THE CEO STRATEGY?

External loan applications, 3rd parties to complement your lending

New distribution workflow for staff sets stage for new types of **ready-to-service integrations**

 **Loan Origination Systems - Ready to Book Loans**

Loan Origination Systems are complete start to finish loan underwriting process. Different systems offer different capabilities depending on the vendor. Also note, not all LOS systems will integrate with CU*BASE.



I WANT TO PARTNER WITH
LENDING 360



I WANT TO PARTNER WITH
MERIDIANLINK INC.



I WANT TO PARTNER WITH
SYNC1



I NEED A
**DIFFERENT LOAN
ORIGATION
SYSTEM**

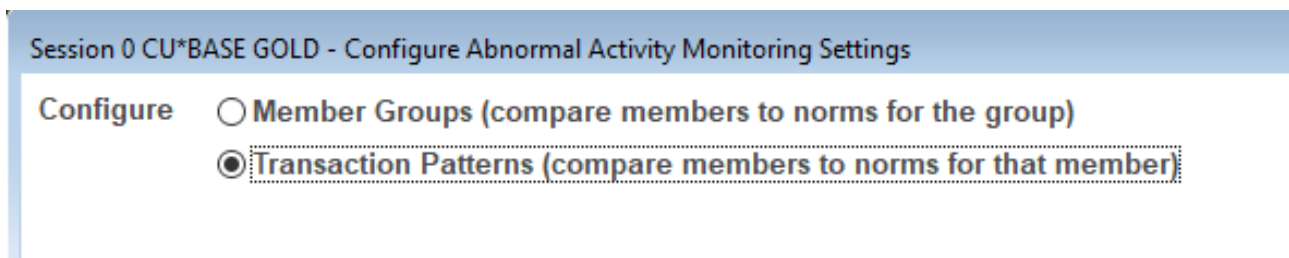
store.cuanswers.com/store/lendervp

A Fraud Management Superstar:

Abnormal Activity Monitoring

A SECOND CONFIGURABLE DASHBOARD, INTRODUCED IN THE 21.05 RELEASE

- ➔ Detect potential fraud by watching member transactions



- ➔ 30 patterns pre-configured by the fraud experts at AuditLink
 - ➔ COMING SOON: New AuditLink services for configuration and daily monitoring

WHAT'S THE CEO STRATEGY?

It's not magic...today you can learn as your members act

Reward members whose activities reward the credit union, and head off members whose intent might not be so genuine

8

Fraud Protections for EFT

AVAILABLE WITH THE 21.10 RELEASE

- ➔ Make it harder for someone to guess the next card number you will assign
- ➔ Randomize a portion of the card number
 - ➔ Or randomize the increment for assigning the next card #
- ➔ Randomize the card expiration month



WHAT'S THE CEO STRATEGY?

Reduce brute-force BIN attacks and mitigate card fraud

This was a 2021 stop-the-trains project...contact SettleMINT to learn why

store.cuanswers.com/settlemint-eft

PROGRESS WITH THESE VENDORS HAS BEEN SLOW BUT WE CONTINUE TO PUSH FORWARD

➔ ITM integration update

- ➔ Hyosung (in beta now!)
- ➔ NCR
- ➔ Diebold
- ➔ Glory



➔ Looking for interested players to join our new **ITM Collaborators** focus group!

imaging@cuanswers.com

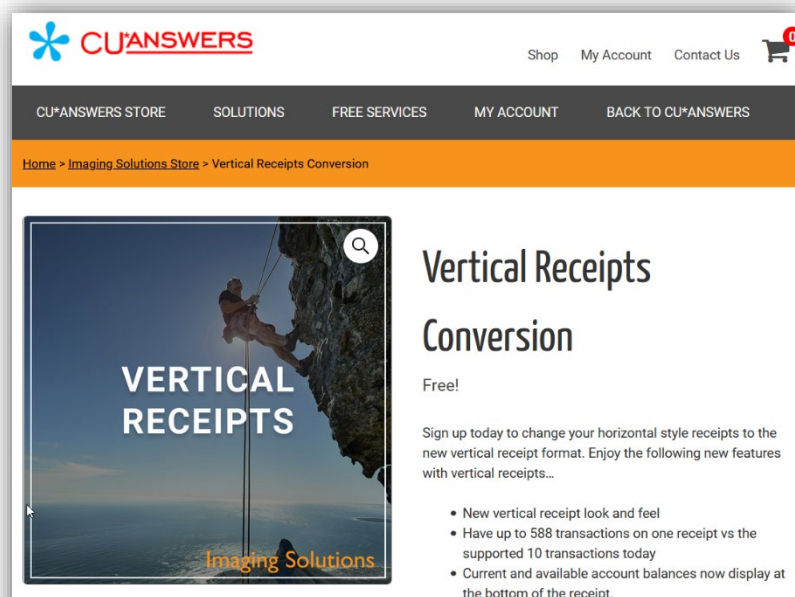
WHAT'S THE CEO STRATEGY?

On the way to every member carrying a branch in their pocket, some people will still need solutions, other than phones, to replace yesterday's teller interactions

It's getting easier...what's your path forward?

75 CREDIT UNIONS ACTIVE NOW, 24 MORE IN THE PIPELINE TO CONVERT NEXT 90-120 DAYS

- ➔ The marketing machine will kick in again as soon as the pipeline empties out
- ➔ When will you make your move?



store.cuanswers.com/product/vertical-receipts/

WHAT'S THE CEO STRATEGY?

A significant baby step on the way to no receipts at all

A required step to engage ITMs still kicking out receipts

Much ado about nothing to deny needing receipts

3 PRODUCTS WILL BE LIVE BY THE FIRST SIX MONTHS OF 2022

It's Me 247
Online Banking

The new mobile first design launches another decade of evolution

BIZ LINK 247
Online Banking for Business

Online banking services designed for business teams

My BIZ Personal Business Banking

Beta starts
Jan 2022

A new single-login option for serving your business members

WHAT'S THE CEO STRATEGY?

Decades years ago, OLB represented our hopes for a new, modern teller line replacement

Today, the internet channel represents our hopes for new branching styles, new retailing styles, and new organizations for where our members are going

Does your business plan sound like you're going there, too?

Virtual Branches that Represent Business Members

- ➔ Today's storefront is based on a URL or a mobile app
- ➔ If you're just getting started with your business program, you already lost the brick-and-mortar fight to attract this audience
- ➔ Get on the street: get on the 'Net



Multi-login
for business
teams



Beta starts
Jan 2022

Single-login
for business
members

How will you hang out your shingle as a business ready to attract and maintain relationships with business members?

- ➔ Tap into an affordable shared data warehouse space
 - ➔ \$0 software/hardware investment
- ➔ Data storage for decision-makers:
 - ➔ Project files, data collected from 3rd parties, results from surveys...
 - ➔ Long-term archives of Tracker notes, custom reports...
 - ➔ Optics data to gain insights from non-transactional member activity



WHAT'S THE CEO STRATEGY?

There's a new scorecard for CU operators

It's based on your grasp of data and your creativity for acting on it

Don't bet your jobs on yesterday's belief that data is someone else's job

Data Warehousing Introducing AI*Engaged

A NEW COPYRIGHT COMING IN 2022

- ➔ A new data workspace for analysis
- ➔ For CUs with a data warehouse
- ➔ A set of **premium dashboards** designed just for data analysts

WHAT'S THE CEO STRATEGY?

The problem with keeping up with the Joneses is that the Joneses had a plan...do you?

AI*Engaged is a kick-starter for new skills and new ways of thinking about data for your future

 AI*Engaged



cuanswers.com/solutions/asterisk-intelligence

Introducing AI*Engaged

A completely new, web-like look and feel

AI*Engaged - Sign On

AI*Engaged

Sign in

Sign In

AI*Engaged - Data Warehouse Tools

Home

AI*Engaged

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ma
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ma
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ma
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ma

View/Run My Custom Reports

Library Statistics

Manage My Custom Reports

Library Dashboard

CU*BASE Report Builder (Query)

Library Authority Mana

Report Automation (Query)

Online Banking Optics

Data Warehouse Tutorials

Watch our latest video tutorials on how to utilize these tools to give you the best data.

Data Warehouse Tutorials

Watch our latest video tutorials on how to utilize these tools to give you the best data.

AI*ENGAGED - Manage Custom Report Definitions

Manage Custom Report Definitions

Home

Data Warehouse: QY

Jump to name...

Run Report

View Tables

Copy

Delete

Preview Report

Rename

Work With

QUERYFR

of custom report definitions 48

New Report

Search for:

Search for Description containing...

Table name...

Created by...

Refresh

Date Created From...

Date Created To...

Last Changed From...

Last Changed To...

| <input type="checkbox"/> | Query Name | Query Description | Created By | Date Created | Last Changed | Last Used |
|--------------------------|------------|-------------------------------------|------------|--------------|--------------|--------------|
| <input type="checkbox"/> | ACCOUNTS | | MIKEW | Jan 04, 2017 | Jan 04, 2020 | May 13, 2021 |
| <input type="checkbox"/> | ACCTNGRPT | test 52827 | SARAHZ | Apr 19, 2021 | Apr 19, 2021 | Apr 26, 2021 |
| <input type="checkbox"/> | ALLLOANS | testing report auto | SARAHZ | Apr 19, 2021 | Apr 19, 2021 | Apr 30, 2021 |
| <input type="checkbox"/> | ATESTFILE1 | RUN - list of members | AHAWKES | Nov 19, 2019 | Jan 04, 2020 | Apr 26, 2021 |
| <input type="checkbox"/> | ATESTFILE2 | CHG - final file only reg e changes | AHAWKES | Nov 19, 2019 | Jan 04, 2020 | Apr 26, 2021 |
| <input type="checkbox"/> | AUDICCSUM | count logins for each account base | AHAWKES | Nov 07, 2019 | Jan 04, 2020 | Apr 26, 2021 |
| <input type="checkbox"/> | AUDICCSUM2 | | AHAWKES | Nov 07, 2019 | Jan 04, 2020 | Apr 26, 2021 |
| <input type="checkbox"/> | AUTOLOANS | test for beta | SARAHZ | Apr 01, 2021 | Apr 02, 2021 | Apr 26, 2021 |
| <input type="checkbox"/> | BDAYTODAY | testing | SARAHZ | Apr 19, 2021 | Apr 30, 2021 | Apr 30, 2021 |
| <input type="checkbox"/> | CHARGEOFF2 | Test CHARGEOFF2 | DONALDP | Mar 02, 2015 | Jan 04, 2020 | Apr 01, 2021 |
| <input type="checkbox"/> | CLICK | | MARYV | Jul 01, 2021 | 0/00/0000 | 0/00/0000 |
| <input type="checkbox"/> | COPY2 | DELETE LATER | AHAWKES | Nov 19, 2019 | Jan 04, 2020 | Apr 26, 2021 |
| <input type="checkbox"/> | CREDIT | test | SARAHZ | Apr 19, 2021 | Apr 26, 2021 | Apr 26, 2021 |
| <input type="checkbox"/> | DATABASE | database search assistant | KSORENSEN | Dec 21, 2017 | Jan 04, 2020 | Feb 22, 2021 |
| <input type="checkbox"/> | EXTDELX | Test EXTDELX | DONALDP | Mar 02, 2015 | Apr 19, 2021 | Apr 19, 2021 |
| <input type="checkbox"/> | FISERVBAL | Creates Fiserv balances in EMPNUC | AHAWKES | Sep 02, 2021 | Sep 10, 2021 | Sep 10, 2021 |
| <input type="checkbox"/> | FISERVBAL2 | FISERV Balances - with FCUA | AHAWKES | Sep 02, 2021 | Sep 10, 2021 | Sep 10, 2021 |
| <input type="checkbox"/> | FISERVCUA | CU*A Balances - Creates FCUA file | AHAWKES | Sep 02, 2021 | Sep 10, 2021 | Sep 10, 2021 |

< Previous

Next >

Also runs...

Randy's Dozen Tools You Should
Be Using Now

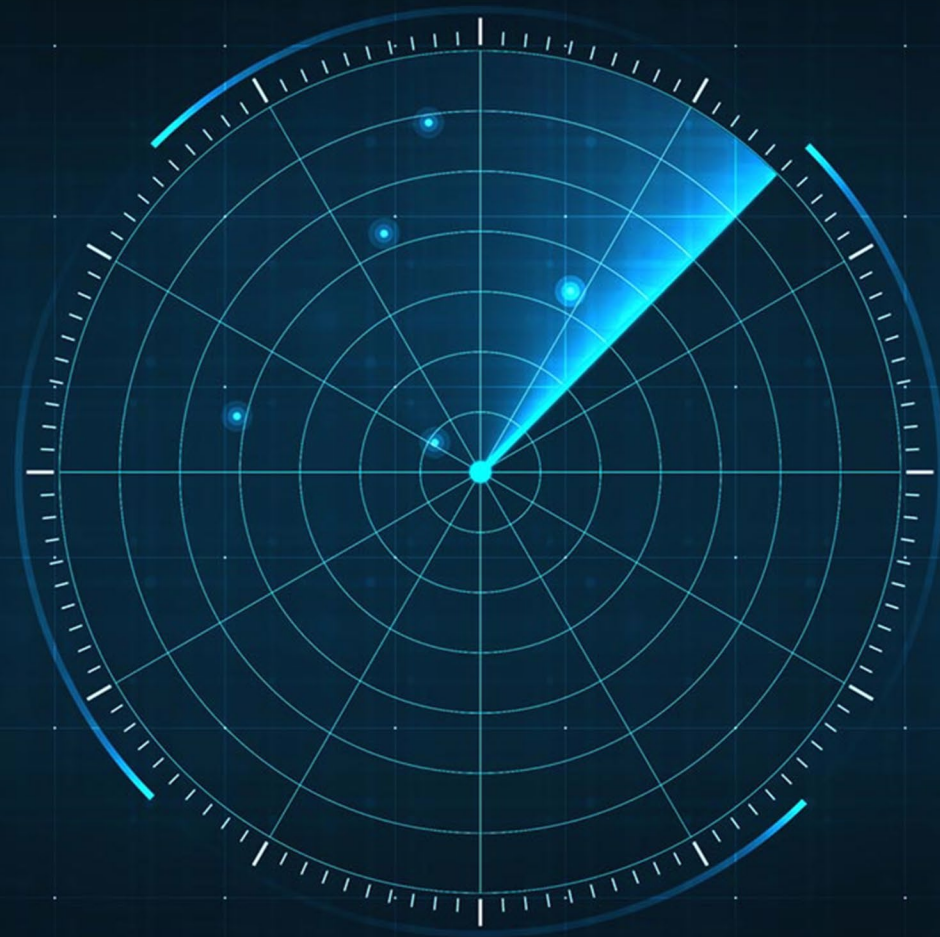
- ➔ “Who Earned Dividends” dashboard
- ➔ “Where Your Members eSign” dashboard
- ➔ Internet retailer pricing tools
 - ➔ ANR fees by delivery channel
 - ➔ Separate pricing for ACH instant deposits and stop pays via It's Me 247
- ➔ Nostradamus: A new engine for predictive retailing
- ➔ Summary statements for business credit card programs



cuanswers.com/resources/doc/release-summaries/

Geoff's Dozen Development Projects to Watch

COMING IN 2022 & 2023

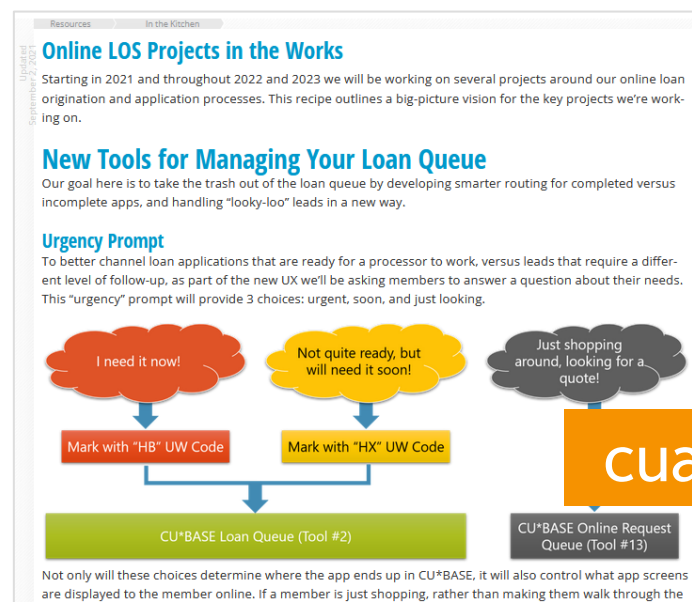


AN INTENSE FOCUS ON INTERNET-ENABLED, AUTHENTICATED MEMBERS

- ➔ New tools to manage the queue
 - ➔ Remove incomplete apps from your loan queue...or move them to a separate marketing queue
 - ➔ “Store and return” for incomplete apps
 - ➔ Urgency prompt
- ➔ Improvements to the online app

WHAT’S THE CEO STRATEGY?

We’ll give you tools to manage online applications differently in the future



cuanswers.com/resources/kitchen/

2

New Foundations for Keeping Pace with the EFT Vendor Market

COMING IN 2022 & 2023

- ➔ 8-digit BIN mandate
 - ➔ Implementing CU*BASE changes in April 2022
- ➔ Setting the stage for **digital issuance** and **provisioning to online wallets**
 - ➔ APBATCH4

WHAT'S THE CEO STRATEGY?

Mandates

Building a foundation for future fraud management and digital issuance tools



3

Card Activity Optics Projects

EARNING FROM YOUR MEMBER EFT ACTIVITY

- ➔ Analyze where members shop, all the way down to the merchant level
 - ➔ Configure your own Merchant Category Code (MCC) groups
- ➔ Give members a special deal based on where they shop
 - ➔ CC promo rates by MCC group
 - ➔ CC cash back programs by MCC group
 - ➔ Debit card rewards by MCC group

WHAT'S THE CEO STRATEGY?

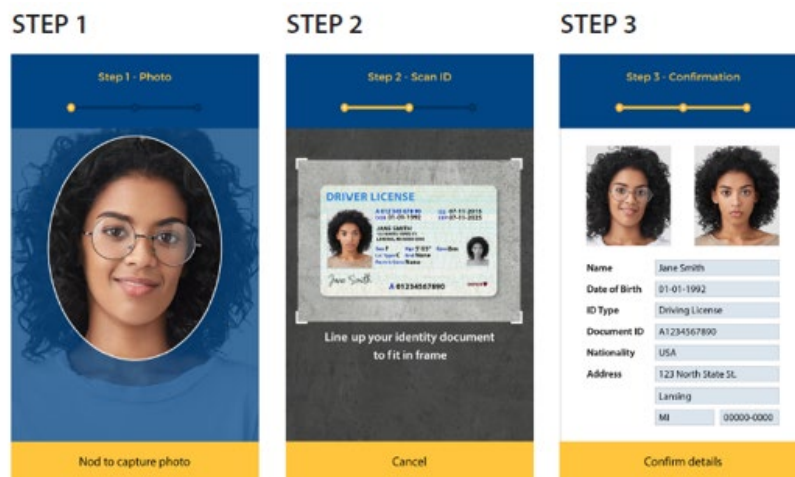
Earn on what you know about how members spend their money

4

MACO for MOP: Digital Identity Proofing

REPLACING PRECISE ID FOR UNDERWRITING NEW MEMBERSHIPS

- ➔ Uses facial recognition to compare a photo ID image to a selfie taken by the new member



- ➔ Records the photo ID in your archive
- ➔ Secures a 1-year MACO license for the member to use for mobile app authentication

WHAT'S THE CEO STRATEGY?

Change with the times

Relies less on the person's memory of past activity and more on today's retailing approaches

Starting the Evolution for **It's Me247** Online Banking

BEAR WITH US AS WE WORK ON MERGING MTG AND OLB DEVELOPMENT APPROACHES

➔ MTG release approach:

- ➔ Multiple versions in the field at a time
- ➔ Annual schedule for new versions
- ➔ You choose when to release the next version of the app to members

➔ OLB release approach:

- ➔ Single version in the field
- ➔ Automatic updates to via the CU*BASE release schedule and periodic updates

WHAT'S THE CEO STRATEGY?

As internet retailers, CEOs must adopt the vision for online and mobile banking being a cohesive strategy

If you embrace the channels as one, CU*Publisher will help you manage a consistent user experience



Projects in the Works

➔ New authentication options

- ➔ Expanding the first-time authorization method (email or text code) for other purposes

➔ Making “Mobile First” a two-way street

- ➔ Finding ways to have a deeper and richer experience for both desktop *and* mobile users

➔ MACO for desktop banking

- ➔ New authentication models that reduce the need for passwords and security questions

➔ New tools for managing a portfolio of businesses

- ➔ Jump between business memberships via  **BIZ LINK247**
Online Banking for Business

➔ New tools for members to manage their lives *and* their business

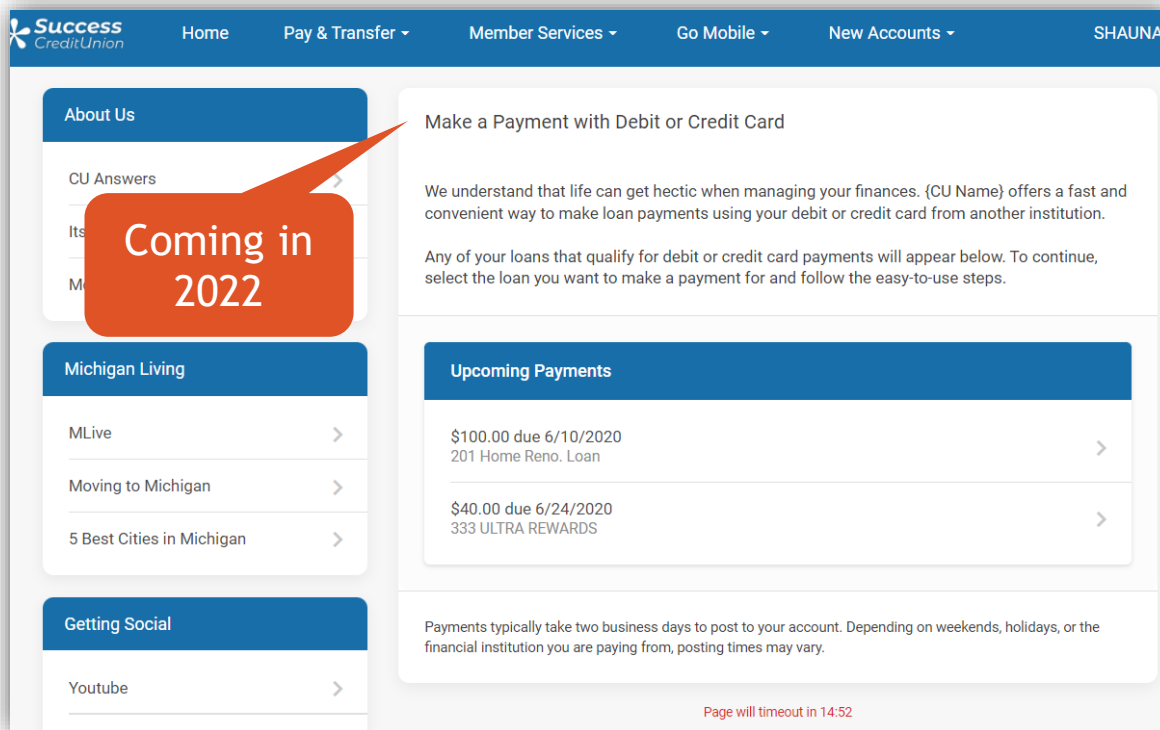
- ➔ Jump between and  **It's Me247**
Online Banking
and  **MyBIZ** Personal Business Banking

➔ Other tweaks based on your early feedback

➔ ...and much, much more!



- ➔ Integration to Magic-Wrighter's LoanPay Express from online banking and the mobile app



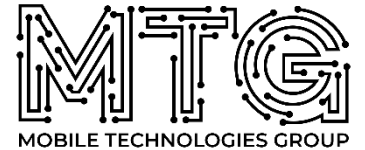
WHAT'S THE CEO STRATEGY?

Everyone is trying to facilitate payment processes everywhere, for everybody

So we're building payment processing into our channels as well

What's Coming for the Mobile App?

PROJECTS WE'RE WORKING ON NOW



➔ RDC Enrollment via CU*BASE

- ➔ Auto-enrollment control... enroll and immediately make your first deposit
- ➔ Direct CU control of daily limits
- ➔ New enrollment analytics

➔ Enhancements to the Card Controls app

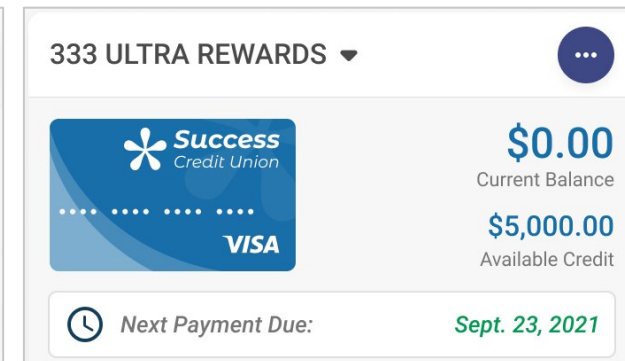
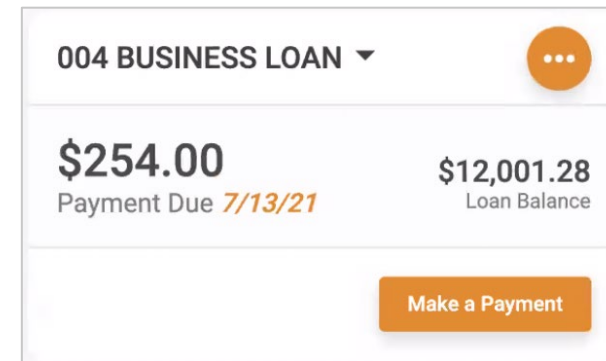
- ➔ Show transactions for a specific card only
- ➔ Include pending transactions in the list

➔ Loan widget

- ➔ What do I owe?
- ➔ Make a payment now!

➔ Card widget

- ➔ What's my available credit?
- ➔ When's my next payment?



7

CU*Publisher

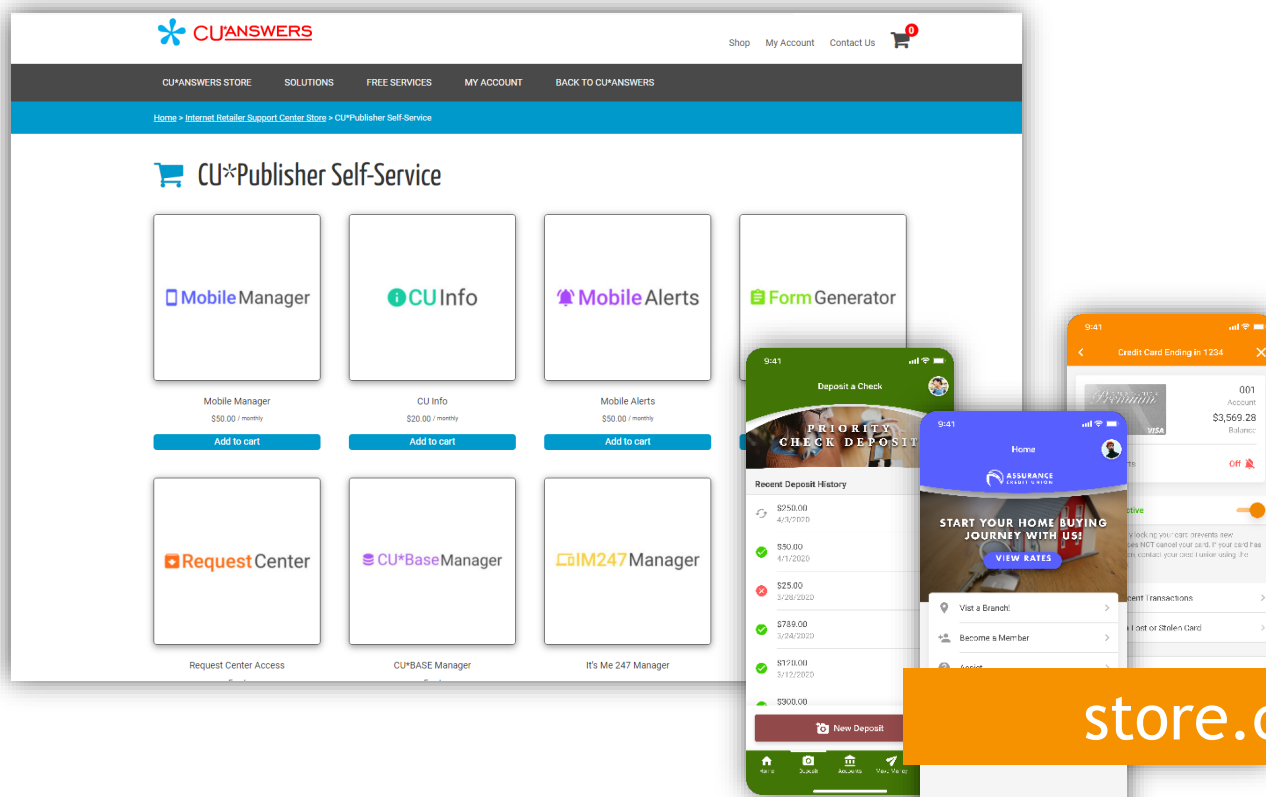
THE MOST POWERFUL CONTENT MANAGEMENT SYSTEM WE'VE EVER PRODUCED

➔ Going live as a CU user tool - how will this change your world?

WHAT'S THE CEO STRATEGY?

You've always asked for the power to manage the member experience...what will you do with it, now that you have it?

Staff a team that can use it, contract with a vendor to use it, and understand how your power is growing



store.cuanswers.com/store/irsc

HELPING YOU LAUNCH A BUSINESS DEPARTMENT AT YOUR CREDIT UNION

- ➔ The BizLink Advisory Board is driving 5 tactical development projects at a time

The screenshot displays the BizLink website interface. At the top, the 'BIZ LINK' logo is prominent. Below it, a navigation bar includes 'Solutions' and 'BizLink'. The main heading reads 'BizLink – Integrated Business Solutions'. A sub-header states: 'The BizLink team is your credit union's resource for everything related to Business Member Programs. Our consulting related to credit union business member programs focuses on three distinct channels:'. A list of three channels follows: 1. Business services and savings portfolio configurations and consulting; 2. Business lending portfolio configurations and consulting; 3. Business member program partner integration management and consulting. Below this, a 'BizLink Quick Jump' section provides links to 'Current Initiatives', 'Business Member Tools in CU*BASE', '2021 Advisory Board', 'Meet the BizLink Team', 'Other Business Services CUSOs', 'FAQ', and 'Contact BizLink'. At the bottom, a section titled 'Our Initiatives for 2021' begins with the text: 'The BizLink Team has worked with the our advisory board and partners to identify five initial initiatives and projects for development for business members'.

WHAT'S THE CEO STRATEGY?

CUs with business programs — and goals to be a comprehensive CU for business members — are leading the way

Should our CUSO help CUs with the goals to have a business program, or just the tools?

cuanswers.com/solutions/bizlink

BizLink Advisory Board Tactical Initiative:

Business Sweep Accounts

HELPING BUSINESS MEMBERS MAXIMIZE THEIR EARNINGS ON OPERATIONAL ACCOUNTS

➔ Daily sweep from operational to investment account...just in time to accrue dividends

➔ Leave the funds there or sweep them back again, ready for the next day's business

➔ Flexible monthly fees, custom for each business relationship

MAX  **EARNINGS**
Money Management Sweeps

COMING IN 2022 VIA:
BIZ  **LINK247**
Online Banking for Business

cuanswers.com/resources/kitchen

BizLink Advisory Board Tactical Initiative:

ACH Posting Controls for Businesses

ALLOWING BUSINESS MEMBERS TO CONTROL WHAT HITS THEIR ACCOUNTS VIA ACH

- ➔ Block all ACH debits
- ➔ Max \$ limits
- ➔ Approved company IDs
- ➔ Non-approved company IDs
- ➔ Flexible monthly fees, custom for each business relationship



cuanswers.com/resources/kitchen

9

Tracking Recoveries

ENHANCEMENTS TO CU*BASE LOAN WRITE-OFF/CHARGE-OFF TOOLS

➔ Coming in 22.05:

- ➔ Calculate daily accruals on written-off loans
- ➔ Expand the database to allow you to find data on recoveries

➔ Up next:

- ➔ Create a payoff calculator
- ➔ Collecting payments that include interest since write-off, fees, fines
- ➔ More behind-the-scenes automation and tracking/analysis tools

WHAT'S THE CEO STRATEGY?

Tracking the big picture
related to loan servicing life
cycles

Think “static pool analysis”

- ➔ Making room for innovation with new technologies
 - ➔ More customizable workflow controls
 - ➔ Marketing on receipts?
- ➔ Foundational project for replacing ProDOC (forms)
- ➔ Freshen up the receipts process with a new integrated approach (*think photo IDs in Xpress Teller*)
 - ➔ No print session
 - ➔ No ProDOC for receipts

WHAT'S THE CEO STRATEGY?

Our partnership with eDOC has given our network insights into the possible future of receipts, and how transaction data can be used

The concept of native receipt data will lead to changes in all our futures

11

Analytics Booth

A NEW LOOK AND FEEL IN 2021, AND BIG GOALS FOR 2022

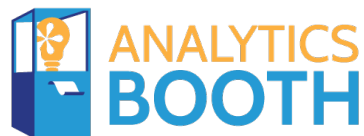
- ➔ 2022 Goal: Teaching and consulting with credit union board members
- ➔ Are you ready to engage your board members with the power of Analytics Booth?



WHAT'S THE CEO STRATEGY?

Shorter board meetings...consent agendas...dim lights in the boardroom...more trips

Give board members a significant role, and tools that encourage them



cuanswers.com/solutions/asterisk-intelligence

WHY DO WE HAVE TWO? HOW WILL WE CONTINUE TO MAKE THEM DISTINCTLY DIFFERENT?

- ➔ By focusing on features that are unique to Xpress Teller
- ➔ In development:
 - ➔ Posting limits by teller
 - ➔ Memo transactions for check-cashing
- ➔ On the drawing board:
 - ➔ Printing checks/money orders to a tellerless branch
 - ➔ Adding a 3rd instrument (for Cashier's or Treasury Checks)

WHAT'S THE CEO STRATEGY?

Designed for different environments, different front-line strategies

Xpress Teller: A Place to Try New Things

37

Session CU*BASE GOLD - FRANKENMUTH CREDIT UNION

File Edit Tools Help

XpressTeller

Acct # 62 / Verify Identity

Serving: ROSABELL

Name
ROSABELL

Birthdate
Dec 17, 2013


Gender
F

Age
7

Drivers License #
INFANT

Code word
"none specified"

Member address is wrong



Edit

Enlarge

Account Notes

| Type | Comment | Date |
|------|----------------------------------|-------------|
| 000 | ACCOUNT DECLARED DORMANT. ALL AC | ar 21, 2021 |

View Account Balances

Checks/Money Orders

Funds In

Deposits/Withdrawals

Most Recent Tracker Activity

| | | |
|--|-------------------|--------------|
| Jun 26, 2021 05:01:38 AM | by employee ID 99 | Memo type OP |
| OFAC scan run on 06/26/2021. No suspected match. | | |
| Jun 19, 2021 05:01:34 AM | by employee ID 99 | Memo type OP |
| OFAC scan run on 06/19/2021. No suspected match. | | |
| Jun 15, 2021 07:23:34 PM | by employee ID -X | Memo type CP |
| Cass Certification run for MASTER file address, no changes made. | | |
| Jun 12, 2021 05:01:35 AM | by employee ID 99 | Memo type OP |
| OFAC scan run on 06/12/2021. No suspected match. | | |
| Jun 05, 2021 05:01:34 AM | by employee ID 99 | Memo type OP |
| OFAC scan run on 06/05/2021. No suspected match. | | |
| May 29, 2021 05:01:37 AM | by employee ID 99 | Memo type OP |
| OFAC scan run on 05/29/2021. No suspected match. | | |
| May 22, 2021 05:01:37 AM | by employee ID 99 | Memo type OP |
| OFAC scan run on 05/22/2021. No suspected match. | | |
| May 15, 2021 05:01:37 AM | by employee ID 99 | Memo type OP |
| OFAC scan run on 05/15/2021. No suspected match. | | |
| May 08, 2021 05:01:37 AM | by employee ID 99 | Memo type OP |
| OFAC scan run on 05/08/2021. No suspected match. | | |
| May 01, 2021 05:02:45 AM | by employee ID 99 | Memo type OP |
| OFAC scan run on 05/01/2021. No suspected match. | | |

Available now:
On-screen photo
IDs with a new
image editor

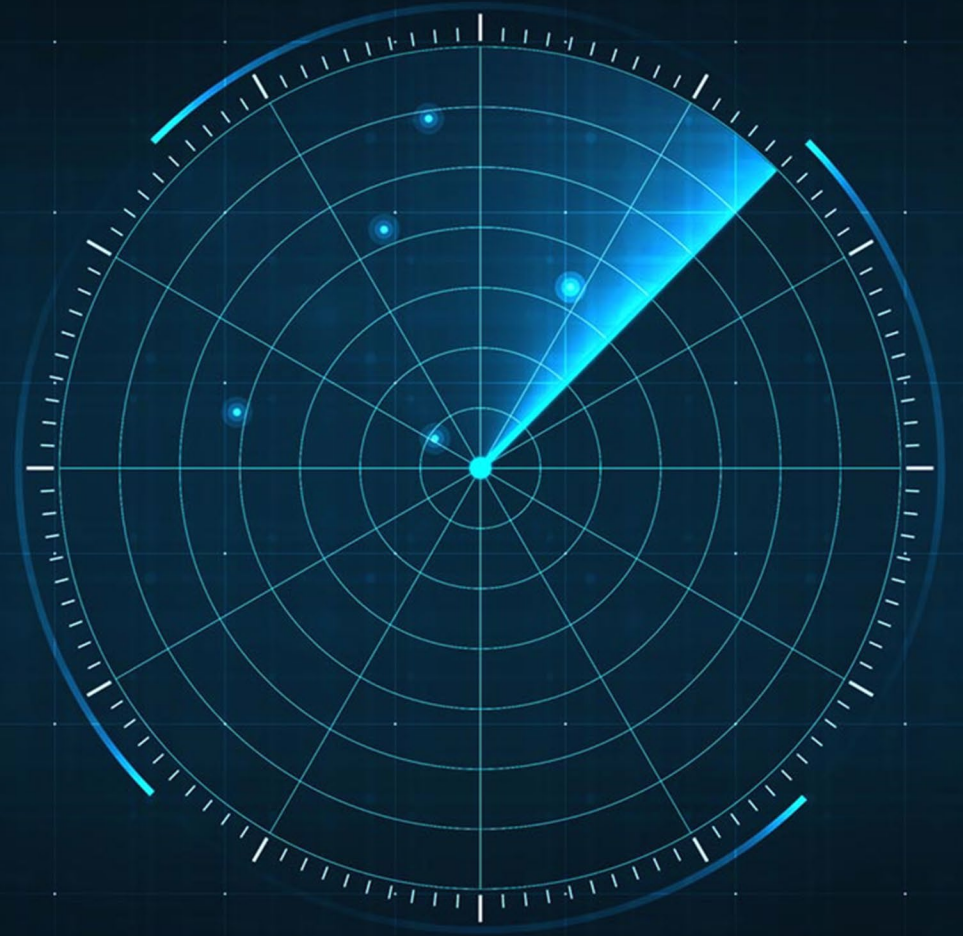
Coming in 2022: Read recent
tracker conversations with this
member while you post their
transaction

← → ↑

🖨️ 🔗 ⓘ ? @

(7104)XL 7/07/21

The Future of CEO Strategies Events



cuasterisk.com

Staying Engaged with CEOs



CEO Strategies Zoom Event

March 2022

(date to be announced)



CEO Strategies Face-to-Face Event

(Visit the Innovation Center in Las Vegas, NV!)

November 2022

(dates to be announced)

FOR CREDIT UNION CEOS ONLY

Staying Engaged with Your Teams



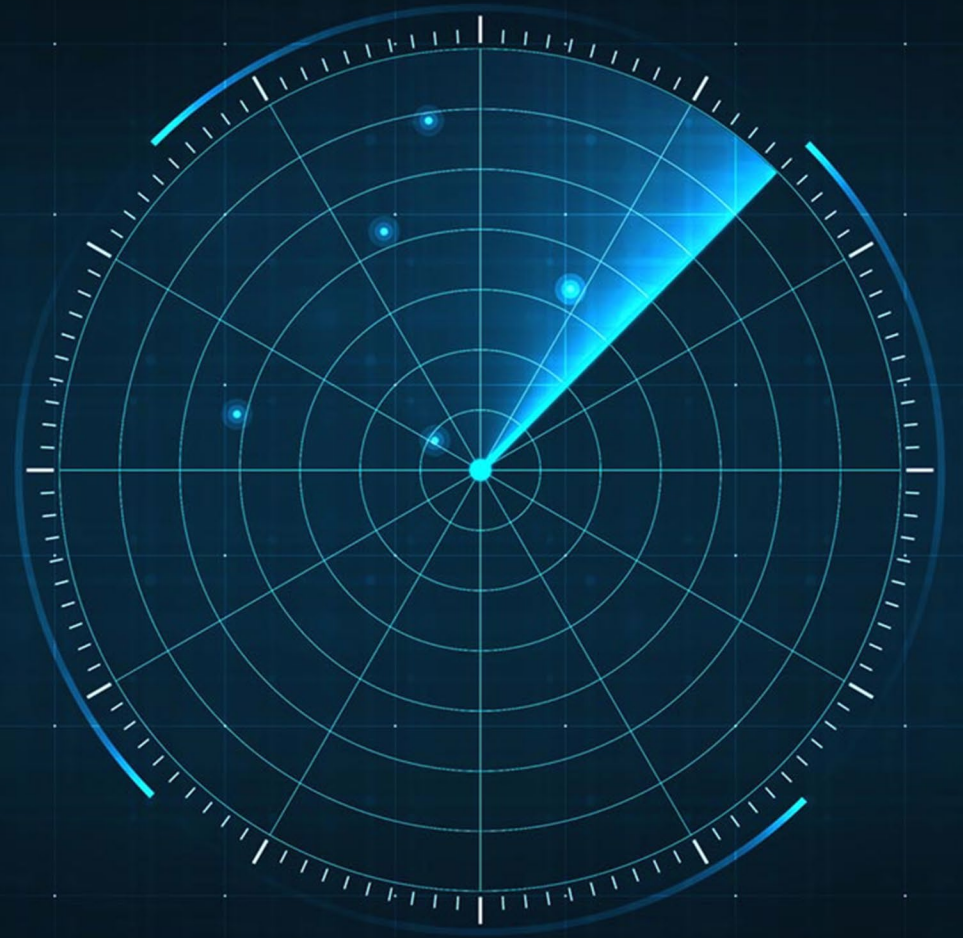
2022 Leadership Conference,
Annual Stockholders Meeting,
& Golf Outing

June 14-16, 2022

At the JW Marriott in downtown
Grand Rapids, MI

FOR CEOS, BOARD MEMBERS, & KEY CU LEADERS

Thank you!



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