

# 2022 **ANCILLARY** PRICING GUIDE



CU\*ANSWERS



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# PRICING PHILOSOPHY

One of the cornerstones of our industry is adherence to the cooperative principles that differentiate credit unions from other financial services providers. Like your credit union, CU\*Answers is also a cooperative, 100% owned by our customer-owners. As such, we feel it is a mandate to provide full disclosure when it comes to pricing of our products and services so we can walk the talk on our philosophy of charging only when we have to, not simply because we can.

For our CUSO, pricing our offerings is very straight forward: we take on the perspective of a customer-owned partner whose ultimate goal is the financial success of the credit unions we serve. Our pricing models are designed to help facilitate the growth and sustainability of our credit union partners while investing in their futures through shared technology development, and, as importantly, **ownership of that technology. THE MANUFACTURER'S ADVANTAGE.**

To that end, we believe that the pricing in this year's Guide meets our goal of being **disruptive to the established core data processing pricing methodology** that exists in our industry. I hope that this document is a catalyst for all who read it to dig a little deeper into not only our products and services, but also our business model and our people.



Have a great 2022!

Scott Collins  
EVP of National Sales and Marketplace Relationships  
[scollins@cuanswers.com](mailto:scollins@cuanswers.com)



# THE 7 CORNERSTONES OF THE PRICING PHILOSOPHY

As a cooperative, we remind ourselves that each and every time a client remits a payment, that paid invoice is an investment, not simply a transaction for services rendered. Therefore, our price should be based on our continued ability to innovate, carry forward as an ongoing concern, and ultimately, add to the collective capital of the credit union system. The expected return from our service is truly not reflected only in a price. It is based on seven simple concepts that we hope our clients will leverage to gain the ultimate return on every dollar they spend on our services:

- 1 The power of ownership
- 2 A focus on utilization
- 3 Be the best you can be
- 4 First to implement
- 5 Guaranteeing the difference
- 6 The value of equity
- 7 Return on investment

## LEARN MORE

This Pricing Guide is a snapshot in time, and is modified annually. To fully understand our pricing philosophy as a cooperative CUSO, take a look at our Historical Pricing Perspective Series. Contact the Sales Team for copies at [sales@cuanswers.com](mailto:sales@cuanswers.com).

### HISTORICAL PERSPECTIVES

- VOLUME 1 : 1999 - 2004
- VOLUME 2 : 2005 - 2009
- VOLUME 3: 2010 - 2014
- VOLUME 4: 2015-2019

## ADVANTAGECIO SERVICES

www.advantagecio.com

	Cost
<b>Business Impact Analysis</b> ( <i>predict the consequence of a disruption</i> )	\$2,000 ( <i>minimum</i> )
<b>Cyber Security Compliance Package</b> <ul style="list-style-type: none"> <li>• Information Security Risk Assessment</li> <li>• Business Continuity Plan/Business Impact Analysis</li> <li>• Information Security Program and Policies</li> <li>• Assistance with examination and audit preparedness/response</li> <li>• Annual Information Security Report for the Board</li> </ul>	\$300/month ( <i>minimum</i> )
<b>Incident Response or Business Continuity Tabletop Exercise</b>	Starting at \$400
<b>Disaster Recovery/Business Continuity Plan Creation, Implementation and Maintenance</b>	\$2,500 ( <i>minimum</i> )
<b>General IT Consulting and Project Management</b>	Quote provided
<b>Information Security Risk Assessment</b> ( <i>measure effectiveness - risk mitigation controls</i> )	\$1,600 ( <i>minimum</i> )
<b>Information Technology Resource Development</b> ( <i>IT staff planning and coaching</i> )	Quote provided
<b>Managed Vulnerability Assessment and Analysis</b>	Starts at \$300/month
<b>Policy and Compliance Tune Up</b> ( <i>ensure consistency and sustainability of operations</i> )	\$1,200 ( <i>minimum</i> )
<b>Cybersecurity Training and Testing</b>	Quote Provided
<b>Strategic Technology Planning and Implementation</b> ( <i>align IT investments with the Bus.Plan</i> )	\$2,400 ( <i>minimum</i> )
<b>Remote Access Assessment</b> ( <i>evaluate the security of your remote work setup</i> )	Quote Provided
<b>Cybersecurity Assessment</b> ( <i>Review of network &amp; systems, internal and external vulnerability testing &amp; detailed report with recommendations</i> )	\$2,000 ( <i>minimum</i> )
<b>VCIO Service</b> ( <i>Executive IT Team will help you with your CU's strategic technology initiatives, compliance challenges, budgeting and planning. One time and recurring engagements available.</i> )	\$750/month ( <i>minimum</i> )
AdvantageCIO is CU*Answers strategic technology consulting team—for more information please contact <a href="mailto:info@advantagecio.com">info@advantagecio.com</a> .	

## AUDITLINK SERVICES

auditlinksuite.com

	Cost	
<b>AuditLink Daily Log Management Full Service</b> ( <i>pre-defined list of daily/ weekly/ monthly/annual compliance monitoring tasks</i> )	\$105 - \$315/week	
<b>AuditLinkVM</b> ( <i>A new state of the art vendor mgmt. service that helps credit unions meet the growing demands and pressures of managing critical relationships.</i> )	\$3,000-\$5,500 Implementation \$300 - \$500/month	
<b>BSA Review &amp; ACH</b> ( <i>through alliance with Lillie</i> )	Bid and based upon asset size	
<b>Duration Analysis -</b> ( <i>Proving your average duration on non-term share accounts is fast becoming a requirement for winning your ALM assumptions</i> )	Tiered starting at \$1,250	
<b>Employee Security Review</b> ( <i>Review all tool assignments, team templates, special security assignments, and best practice in managing employee security</i> )	Tiered starting at \$1,250	
<b>Abnormal Activity Monitoring</b> ( <i>monitoring of members activity to uncover high risk accounts</i> ) < 5000 members 5,001 to 10,000 members 10,001 to 20,000 members 20,000 to 40,000 members 40,000 members	Implementation	Weekly
	\$600	\$42
	\$875	\$52
	\$1,080	\$67
	\$1,243	\$77
	Bid	Bid



<b>Abnormal Activity Monitoring - Transaction Pattern Configuration</b> <i>(one time configuration of transaction patterns to uncover high risk accounts)</i> <b>Implementation</b> < 5000 members 5,001 to 10,000 members 10,001 to 20,000 members 20,001 to 40,000 members >40,001 members	\$810 \$1,246 \$1,803 \$2,680 Bid
<b>AuditLink Lite</b> <i>(a complete review of all configurations associated with Federal regulations and FFIEC guidance)</i>	FREE!
<b>Concentration Risk Analysis</b> \$0-\$50M \$50.1M-\$100M \$100.1M-\$300M \$300.1M and above Annual Review Quarterly Runs	\$1,500 \$2,000 \$3,000 \$3,500

## DEVELOPER'S HELP DESK (DHD)

dhd.cuanswers.com

### OFF-THE-SHELF (OTS) SERVICES

Traditional programming processes CU\*Answers regularly performs for supported vendors that normally do not require more extensive custom research/ design or development. Depending upon the OTS project, both a one-time and monthly maintenance fee may be included. Visit the CU\*A Online Store at [store.cuanswers.com](http://store.cuanswers.com) to review a variety of DHD related products and services to purchase.

Some popular OTS options:	Cost
<b>EFT (ATM, debit) vendor conversion</b> <i>(per a new/supported vendor)</i>	Quote provided
<b>Online Credit Card vendor conversion</b> <i>(per a new/supported vendor)</i>	Quote provided
<b>Loan Origination System</b> <i>(per a new/supported vendor)</i>	Quote provided
<b>Loan Insurance File Transmissions/ Posting</b> <i>(existing or new)</i>	Quote provided
<b>Data Floods</b> <i>(Basic, Self-directed or Non-Basic/Conditional)</i>	Quote provided
<b>OTB</b> <i>(off trial balance) File Exchanges to/ from 3rd party vendors (existing or new)</i>	Quote provided
<b>Check Processor/ Image Check set-up</b> <i>(existing or new)</i>	Quote provided



## DEVELOPER'S HELP DESK (DHD)

dhd.cuanswers.com

### API DEVELOPMENT SERVICES

Providing tremendous flexibility, speed for integration and low price point to allow others to develop projects that connect with and integrate into the CU\*Answers product suite. Depending on the API project requirements, both a one-time and monthly maintenance fee may be applicable.

	Cost
<b>CU*Answers developed/supported API's</b>	Free
<b>API Modifications/Custom Development</b>	Custom Bid - Quote Provided
<b>Other Vendor API's (as offered via 3rd party developers)</b>	Quote provided

### CUSTOM PROGRAMMING SERVICES

A custom project development strategy for which the client is often the primary architect for designing the project blueprint. We will also work closely with you for helping determine any desired level of CU\*A technical and support resource assist we may offer for helping drive your initiative. Depending upon the custom programming project, both a one-time and monthly maintenance fee may be included.

	Cost
<b>Vendor Integrations</b> <i>Offering a strategy to connect CU*Answers products or services with another vendor. These integrations can be developed as batch, real-time data integrations or on demand data extracts, eliminating manual data entry and duplication.</i>	Custom Bid - Quote Provided
<b>DEX/Data Warehouse Exchanges</b> <i>Providing the components to move data from CU*BASE to a Data Warehouse. This can happen through DEX, which transfers preconfigured files to external warehouses at scheduled intervals, or through services that move the data to other CU*Answers hosted databases.</i>	Custom Bid - Quote Provided
<b>Internet (SSO) Integrations</b> <i>Integrations that allow a member or employee to jump directly from CU*BASE or Online Banking to access separate websites and tools, without the need to independently authenticate (log in).</i>	Custom Bid - Quote Provided
<b>Custom Fees</b> <i>CU*Answers will closely work with your credit union to develop a customized fee strategy to suit your needs.</i>	Custom Bid - Quote Provided
<b>Other Projects</b> <i>Desired interactions or processes that are more complex and specialized than routine OTS product/ service offerings</i>	Custom Bid - Quote Provided



# EARNINGS EDGE

[www.cuanswers.com/solutions/earnings-edge](http://www.cuanswers.com/solutions/earnings-edge)

ACCOUNTING RELATED PRODUCTS AND SERVICES	One Time Charges	Monthly
<b>Member Branch Reassignment</b> <i>(per teller activity)</i>	\$250 <i>(minimum)</i>	n/a
<b>Geographic Branch Reassignment</b> <i>(per member proximity to branches)</i>	\$1,650 <i>(minimum)</i>	n/a
EASY EARNINGS PROJECTS	One Time Charges	Monthly
<b>Member Selected Statement Styles/ Implementation</b>	\$500	n/a
<b>It's Me 247 Configuration Strategies</b>	\$1,000	n/a
MEMBER RELATIONSHIP BUILDING SERVICES	One Time Charges	Monthly
<b>Cross Sales Configuration; Analysis/Tune-Up</b>	\$1,000 <i>(minimum)</i>	n/a
<b>Election Management Services</b> <i>(CU consulting, policy review, audit services)</i>	\$2,000 <i>(minimum)</i> + <i>marketing printing/postage</i>	n/a
<b>It's My Biz Review/Configuration</b> <i>(Business memberships)</i>	\$500	\$1/active subscriber
<b>Marketing Club Configuration/ Tune-Up</b>	\$500	n/a
<b>Management Tune-Up</b> <i>(2 day engagement with CMS experts)</i>	\$3,000 <i>(plus T&amp;E)</i>	Quote provided
<b>Member Demographics Fulfillment</b> - Traditional <i>(Member Demographics w/ 5 Map Images)</i> - Enhanced <i>(Traditional Member Demographics features + Zip Code Analysis)</i>	\$1,000 \$1,500	Quote provided Quote provided
<b>Monthly Board Packet Preparation</b>	\$500	\$250
<b>Analytics Booth</b> <i>(CU data analytics)</i> 0 to 2,999 members 3,000 to 7,999 members 8,000 to 11,999 members 12,000 to 999,999 members	n/a n/a n/a n/a	n/a \$50 \$100 \$150
<b>Patronage; Bonus Dividend Options, Configuration/Tune-Up</b>	\$500 <i>(minimum)</i>	n/a
<b>Service Charge Review/Analysis/Configuration/Tune-Up</b>	\$500	n/a
<b>Savings/Checking/Certificate Product Config. Review/Tune-Up</b>	\$1,000	n/a
<b>Tiered Services Program Review; Configuration/ Tune-Up</b>	\$1,000 <i>(minimum)</i>	n/a
OTHER SERVICES	One Time Charges	Monthly
<b>Loan Participation</b> <i>(startup of program)</i>	\$5,000 + <i>travel expenses</i>	n/a
<b>Back Office Review</b> <i>(consulting service)</i>	\$1,500 + <i>travel expenses</i>	n/a
<b>CFO Training</b> <i>(2 day training at the CU)</i>	\$2,000 + <i>travel expenses</i>	n/a
<b>Election Management Services</b> <i>(CU campaign customization)</i> Consulting Marketing Tellerling <i>(\$300 minimum)</i>	\$100/hr /8 hr min \$500 \$1/paper ballot \$.05/ unique electronic	n/a + <i>printing/shipping/postage</i> + <i>printing/shipping/postage</i> n/a



## EARNINGS EDGE

www.cuanswers.com/solutions/earnings-edge

OFF-TRIAL-BALANCE SERVICE for Third Party Serviced Member Accounts		
	One-time Charges	Monthly
<b>OTB Analytics - Dashboard Integrations (of 3rd party data)</b>	Custom Bid (per Dashboard Option)	n/a
<b>OTB Master File Exchange (per OTB vendor supported)</b> Existing OTB Vendor New OTB Vendor	\$500 minimum Quote provided	\$100* (unlimited OTB supported vendor files)
<b>OTB Payment File Exchange (per OTB vendor supported)</b> New or Existing OTB Vendor	Included in Master File Set-up	Included in Master File Fee
<b>OTB SSO Online Links (per OTB vendor supported)</b> Existing OTB SSO Vendor New OTB SSO Vendor	\$500 minimum Quote Provided	\$25 (1-3 connections) \$75 (4+ connections)
<b>OTB Transaction File Exchange (per OTB vendor supported)</b> New or Existing OTB Vendor (adding transactions from a 3rd party into CU*BASE)	\$5,000 minimum	\$100* (unlimited OTB supported vendor files)

\*File transmissions from CU\*BASE Snapshot Library carry the base \$100 monthly fee. File transmissions coming from CU\*BASE FILEXX carry a \$200 monthly fee.

## IMAGING SOLUTIONS

cuanswers.com/products/imaging-solutions

	One Time Charges	Monthly
<b>Consulting - Imaging Strategy, Retention Schedule, or Process Tune Up (normally 1 day)</b>	\$500 + \$1,000/day onsite (plus T&E)	n/a
<b>Data Export from the Online Vault (conditions apply)</b> ArchView™ (reviewing reports, stmts, tax forms on DVD)	\$300 set-up fee plus Provided on DVD: \$200/data type plus \$50/DVD Raw Data Format: Quote Provided	n/a n/a
<b>In-House Forms and Packages Setup</b>	\$150/form or package	n/a
<b>My Virtual StrongBox (MVSb)</b> <b>Standard</b> (includes 10MB storage/member; each member may optionally purchase additional storage space)  <b>Premium</b> (CU contract w/VSB for level of CU storage desired, additional features)	n/a  Quote provided (via VSB)	Free  Quote provided (via VSB)
<b>One-time In-House Software Update or Migration</b>	\$500 - \$2,500 (est)	n/a
<b>Photo ID Import to Online Vault as part of Conversion</b>	Quote provided	n/a
<b>Release Management - Full Service</b>  # of members 0 - 15,000 15,001 - 30,000 30,001 +	\$2,000	n/a  \$150 \$250 \$350
<b>CU*Answers Enhanced Online Vault</b>  1-3000 members 3001-5000 members 5001-7500 members >7500 members	\$250	\$100/month \$200/month \$350/month \$500/month
<b>eDOC Signature Online Vault</b>	\$150	n/a
<b>eDOC Signature In-House Vault</b>	Quote Provided	Quote Provided

FOR MORE INFORMATION CALL 1.800.327.3478

# INTERNET RETAILER SUPPORT CENTER (IRSC)

irsc.cuanswers.com

Self Service Custom Branding Options	One Time Charges	Monthly
<b>Custom PFM Branding</b> (per vendor capability)	\$500	n/a
<b>CU Publisher Self Service</b> (see Online Store for more details) <ul style="list-style-type: none"> <li>- Mobile Manager</li> <li>- CU Info</li> <li>- Form Generator</li> <li>- Request Center</li> <li>- Mobile Alerts</li> <li>- It's Me 247 Manager</li> </ul>	n/a n/a n/a n/a n/a n/a	\$50/month \$20/month \$20/month Included \$50/month Visit Store for Details
<b>Custom Online Forms Generator</b> (Using the Forms Generator product to create your online forms)	Visit IRSC Online Store for Details	
<b>Direct Login Widget Options</b> (alternative to It's Me 247 button)	Free	Free
<b>Video Customization Service</b> (ability to brand It's Me 247 how-to-videos with CU log, text, voice, software display options)	Quote provided	n/a
<b>Mobile App</b> (plus any 3rd party)	\$250 deployment fee (per Operating System)	
<b>MACO</b> (Multiple Authentication Convenience Options)	\$1.80/user per yr. prepaid (\$2.25 true-up)	
<b>MEV</b> (Membership Eligibility Verification)	Free	
<b>Custom Add Ons</b> (Pay Anyone for Payveris, Manage Cards, Launch Points/Log Out URLs, etc.)	Visit IRSC Online Store for Details	
<b>MAP - Membership Application Process Site</b> (IRSC product) 2 + Sites (for targeted SEGS/audiences)	First Site Free! \$100 setup plus \$20/month (per site )	
<b>MOP - Membership Opening Process</b> (online) Experian Precise ID Verification Account Funding Other Authentication Options	Free \$750 + \$1.34/txn (billed by Experian) Fees billed to the CU client by Magic Wrighter COMING IN 2022!	
<b>MAP +</b> (MAP plus Experian Precise ID Verification) 2 + Sites (for targeted SEGS/audiences) Experian Precise ID Verification	First Site Free! \$100 setup + \$20/site \$750 + \$1.34/txn (billed by Experian )	
<b>Remote Deposit Capture</b> (RDC - via CU*A Mobile App 2.0)	See CheckLogic section on Page 15	



See Our IRSC Online Store for Our New Suite of Mobile Technology Group Service Offerings



# LENDING SERVICES

Provided by Lender\*VP

[www.cuanswers.com/solutions/lendervp](http://www.cuanswers.com/solutions/lendervp)

<i>(pricing may not include applicable 3rd party vendor fees)</i>	One Time Charges	Monthly
<b>FUEL Automated Decision Model</b>	\$3,500	\$0.05/decision
<b>Collections Services</b>	Quote provided	Quote provided
<b>Credit Score Updates</b>	\$500-\$1000	Individual credit bureau fees
<b>CU*Perks Rewards Program Implementation</b>	Quote provided	Quote provided
<b>EFT Consulting &amp; Support</b>	Quote provided	Quote provided
<b>Lender*VP Tune Up</b> ( <i>Lending Management Platform</i> )	Quote provided	Quote provided
<b>Loan Application Import from 3rd party LOS</b>		
<b>Sync1 Systems</b> ( <i>ready-to-book</i> )	\$3,000 set up fee	\$1.00/application
<b>CU Direct</b> ( <i>ready-to-book</i> )	\$10,000 set up fee	\$1.00/application
<b>Meridian Link</b> ( <i>ready-to-book</i> )	\$15,000 set up fee	\$1.00/application
<b>TCI Decision Lender</b> ( <i>ready-to-book</i> )	\$10,000 set up fee	\$1.00/application
<b>CUNA Loanliner Online App Portal</b> ( <i>ready-to-book</i> )	\$750 set up fee	\$0.75/application
<b>Other 3rd Party</b> ( <i>ready-to-book</i> )	Quote provided	Quote provided
<b>Misc. Insurance Coverage Integrations</b> ( <i>GAP, Warranty</i> )		
<b>CUNA Protection Advisor</b>	\$500	\$1.00/quote
<b>Frost VisualGAP</b>	\$500	\$1.00/quote
<b>iQQ</b>	\$500	\$1.00/quote
<b>Pay Day Lending</b> ( <i>MicroLender - web-based orig. tool</i> )	Quote provided	Quote provided
<b>Retailer Direct</b> ( <i>Offsite Electronic Loan App &amp; Approval</i> ) Retailer Direct Web Site	\$1,500 for the first site + \$750 ea. after	\$0.75/application ( <i>inc. email notification to CU</i> )
<b>CUSTOM CU*BASE LOAN FORMS PROGRAMMING</b>	One Time Charges	Monthly
<b>Forms Bundling</b> (up to 14 forms)	\$75/ bundle	n/a
<b>New Forms Programming</b>	\$250/pg. ( <i>minimum</i> )	n/a
<b>Forms Enhancements</b>	Quote Provided	n/a
( <i>laser print to image archival solution</i> )	(\$100 minimum)	
<b>Form Updates &amp; Revisions</b>	\$100/pg. ( <i>minimum</i> )	n/a
<b>Reg V Forms</b> ( <i>Consumer; Real Estate</i> )	\$200 each	\$50 each/annually
<b>INDIRECT LENDING</b>	One Time Charges	Monthly
<b>DealerTrack</b> ( <i>Indirect Auto Financing option</i> )	\$750	\$0.75/application ( <i>plus Dealer Track fee</i> )
<b>CUDL</b> ( <i>Ready-to-book</i> )	\$3,000	\$1.00/app ( <i>plus CUDL fee</i> )
<b>ILT DILLS</b> ( <i>Indirect Auto Financing option</i> )	\$750	\$0.75/application ( <i>plus ILT DILLS fee</i> )
<b>LSI</b> ( <i>Indirect Auto Financing option</i> )	\$750	\$0.75/application ( <i>plus LSI fee</i> )
<b>Route One</b> ( <i>Indirect Auto Financing option</i> )	\$750	\$0.75/application ( <i>plus Route One fee</i> )
<b>TCI</b> ( <i>Indirect Financing option</i> )	\$750	\$0.75/application ( <i>plus TCI fee</i> )
<b>LENDER*RE</b>	One Time Charges	Monthly
<b>Mortgage Import from 3rd party LOS</b> ( <i>Fannie 3.2 format</i> )	\$100	\$3/application
<b>Mortgage Loan Servicing</b> ( <i>Powered by Xtend</i> ) <i>Investor Reporting &amp; Escrow Administration</i>	No charge	Quote provided
<b>Portfolio Conversion</b> ( <i>Powered by Xtend</i> ) <i>Project mgmt. for portfolio conversion from 3rd party servicer</i>	Quote provided	Quote provided
<b>MORTGAGE LENDING SOLUTIONS VIA ACCENTURE</b> <b>MORTGAGE CADENCE</b>	One Time Charges	Monthly
<b>Web-Based Mortgage Application and LOS System</b>	\$1,000 setup fee	\$185 per closed loan package

NEW  
IN 2022!

NOTE THE  
NEW  
OPTIONS  
FOR 2022

FOR MORE INFORMATION CALL 1.800.327.3478

## MARKETING SERVICES

[www.cuanswers.com/solutions/marketing](http://www.cuanswers.com/solutions/marketing)

	One Time Charges	Monthly
<b>Cooperative Campaign</b> - (program allowing you to implement digital campaigns)	\$2,500	\$250 or by monthly
<b>Custom Marketing Collateral Design</b>	Quoted	n/a
<b>Newsletter Service</b> Predesigned template Custom Newsletter design	\$750/yr (4 Qtrs.) \$5,000/yr (4 Qtrs.)	+ printing/shipping/postage + printing/shipping/postage

## SETTLEMINT EFT

[www.cuanswers.com/solutions/settlemint-eft](http://www.cuanswers.com/solutions/settlemint-eft)

EFT CONSULTING AND SUPPORT SERVICES	One Time Charges	Monthly
<b>Instant Issue - Online ATM/Debit/Credit Cards</b> <i>*powered by Entrust Datacard Group (CardWizard) plus applicable 3rd party fees. CUs using Entrust DataCard Group's cloud offering may have additional networking quotes from CU*Answers as applicable</i>	\$5,000 existing vendor \$10,000 - new vendor	3rd party quote provided 3rd party quote provided
<b>Credit/Debit/ATM Card Mass Reissue Project</b>	\$2,500 minimum	n/a
<b>Credit Card Cashback Service</b> <i>Looking for ways to expand your credit card portfolio and to increase your credit union's transactional usage? With the credit card cash back program, not only are you rewarding your members with a percentage back, you are increasing product sales and creating lasting memberships!</i>	\$500 - \$1,300 <i>See our Online Store for more information</i>	n/a
<b>Compromised Card Project - ATM/Debit/Credit</b> <i>Ability to provide CU*Answers with an excel spreadsheet of cards that need to be mass reissued. We will take the spreadsheet issue new cards and send a card order file to your vendor</i>	\$2,500 minimum	n/a
<b>Reset ATM/Debit Limits</b> (Set Same Value for all cards) <i>Ability to change the PIN and/or SIG limits on your ATM/Debit cards. This is a flood to all your members.</i>	\$200	n/a
<b>ATM/Debit Card Purge</b> <i>Ability to Purge ATM/Debit cards from CU*BASE Note: if you are looking for a customized plan, a quote will be provided</i>	\$200	n/a
<b>ATM/Debit Card Tune Up</b> <i>Work with the SettleMINT EFT team to review all configurations for ATM/Debit cards.</i>	\$100	n/a
<b>Credit Card Tune UP</b> <i>Work with the SettleMINT EFT team to review all configurations for credit cards.</i>	\$250	n/a
<b>Online Limit Checking</b> <i>Have CU*Answers validate the total amount spent by your member and ensure they do not go over the amount set by the credit union.</i>	FREE	n/a

## WEB SERVICES

[www.cuanswers.com/solutions/web-services](http://www.cuanswers.com/solutions/web-services)

CUSTOM WEB DESIGN & DEVELOPMENT	One Time Charges	Monthly
Splash Page Architecture Custom Architecture	\$500 Quote provided	n/a n/a
WORDPRESS WITH SITECONTROL WEB DESIGN & DEVELOPMENT	One Time Charges	Monthly
Custom Website Theme	\$4,000 (\$500 discount if site launched within 45 days of training)	n/a
Custom WordPress with SiteControl Maintenance	n/a	\$100/hr (15 min. increments)
WEB SITE HOSTING EMAIL SERVICES	One Time Charges	Monthly
Domain Name Registration and DNS Hosting	n/a	\$50/year
Let's Encrypt (Automatically obtain a browser-trusted certificate)	Free	n/a
SSL Security Certificate Add-on (validates the authenticity of client secured site and web site's identity to members)	\$399	\$25
Other Vendors	\$100/setup	\$25
Static Website Hosting (HTML only)	\$100	\$25
Dynamic Website Hosting*	\$100	\$125
BOARD WEBSITES	One Time Charges	Monthly
Ad Supported	n/a	Free
Ads Removed	n/a	\$25
PROFESSIONAL SERVICES	One Time Charges	Monthly
Custom Web Site Maintenance	n/a	\$100/ hr (15 min. increments)
Existing Web Site Evaluation Report	\$250	n/a
*Dynamic website hosting required for all CMS websites including WordPress. WordPress updates will be automatically applied. Set up fee waived with custom theme development by Web Services.		

## ELECTRONIC CHECK PROCESSING Provided by CU\*Answers

CU*CHECK - ELECTRONIC CHECK PROCESSING	Cost
MEMBER IMAGE CHECK PROCESSING	
0 - 100,000 Items	\$0.01 /item
100,001 - 999,999 Items	\$0.005 /item
Check Return Fees	
1 - 500 Returns	\$1.75/ item
501+ Returns	\$1/ item
Maintenance Fee	\$50/month
Minimum Monthly Processing Fee	\$150
Check Image Access via CU*Check (for non-CU*BASE Clients) Must meet CU*Answers interface specifications	\$500 setup fee (one-time) \$100/month access fee
ArchView Check Images (Images burned to DVD - monthly or quarterly)	\$20/DVD \$0.03/item (plus shipping)
Pricing shown does not include certain FRB fees (i.e. high dollar notification). Final Pricing determined by Credit Union signed contract.	Pricing subject to periodic change



# CHECKLOGIC™ Provided by eDOC Innovations

BRANCH IMAGE DATABASE & FORWARD COLLECTION (CHECK 21)	Cost
<b>CheckLogic Branch Capture Software</b> <i>(one-time fee)</i> Less than 5,000 Members Greater than 5,000 Members	\$1,500 \$2,500
<b>CheckLogic Set-up Fee</b>	\$250/branch
<b>CheckLogic™ Mobile (RDC)</b> One-Time License Fee (Pricing subject to change. Please contact IRSC for current pricing.)  <b>Installation Fee</b> <b>Mobile Monthly Support Fee</b> <i>(Promotional pricing - subject to change. Please contact IRSC for current pricing.)</i>  <b>CheckLogic Mobile RDC-IQ Posting</b>  <b>CheckLogic Mobile Per-item Fee</b> <b>CheckLogic Mobile Restrictive Endorsing</b> <b>CheckLogic Mobile Reject Email Customization</b> <b>Ops Engine Automated Posting to CU*BASE</b>	Under 1k members = waived 1,001 - 5k members = \$495 Over 5k members = \$995  \$500 \$175/month <i>* under 5k members = waived for 12 months then \$75/month for remainder of contract term; over 5k members = waived for 6 months</i>  Under 5K members = \$75/month Over 5K members = \$125/month  \$0.45/item \$0.04/item \$50 See Online Pricing Guide- pg. 8
FORWARD COLLECTION FEE SCHEDULE	Cost
<b>Adjustments<sup>2</sup></b>	Free
<b>CheckLogic Forward Collection</b> <i>(per item fee)</i>	\$0.06 - \$150 minimum per month
<b>Foreign Item Cash Letter</b> <sup>1</sup>	TBD - per CU collection source
<b>Foreign Item Collection</b> <sup>1</sup>	TBD - per CU collection source
<b>Foreign Item Collection/Cash Letter</b> <i>(returned item)</i> <sup>1</sup>	TBD - per CU collection source
<b>Minimum Monthly Forward Collection Fee</b>	\$150
<b>Paper item collection</b> <i>(including Canadian &amp; unscannable items)</i> <sup>1</sup>	TBD - per CU collection source
<b>Paper item collection - returned item</b> <sup>1</sup>	TBD - per CU collection source
CHECKLOGIC™ HARDWARE OPTIONS	Cost
<b>Canon Check Scanner</b> <i>(multiple scanner options available from 1-180 DPM based on processing volume required)</i>	Quote provided
<b>Online Banking Interface</b> <i>(non-It's Me 247)</i>	\$4,995
<b>Warranty Pricing for Up-front Payment Options Available</b>	Quote provided



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## CHECKLOGICLITE™ Provided by eDOC Innovations

MERCHANT IMAGE CAPTURE & FORWARD COLLECTION	Cost
CheckLogic BIZ Remote Deposit Software (one-time fee)	\$1,995
CheckLogic BIZ Installation fee	\$995
CheckLogic BIZ Per Item Fee	\$0.15
CheckLogic BIZ Per Merchant Setup Fee	\$50
CheckLogic BIZ Monthly CU License/Support Fee	\$75
CheckLogic BIZ Monthly Hardware Maintenance	\$25

CHECKLOGIC™ LITE HARDWARE OPTIONS	Cost
Canon/RDM Check Scanner <i>(Multiple scanner options available from 1-180 DPM based on processing volume required)</i>	Quote provided
Online Banking Interface <i>(non-It's Me 247)</i>	\$4,995
Warranty Pricing for Up-front Payment Options Available	Quote provided
CHECKLOGIC™ & CHECKLOGIC™ LITE SUPPLEMENTAL GUIDELINES	Cost
<i>Settlement of funds, next day guarantee credit to CU's account - actual items processed through clearing house.</i>	
ArchView™ DVD Service - Quarterly image archival via DVD	\$50/DVD
Equipment supplies	Quote provided
Unlimited technical support for CU software and scanning needs	Free
Online check image access for twelve months <i>(via eDOC)</i>	Free
<p>1) Any pass-thru charges that are incurred will be assessed by client chosen settlement point in addition to the item fee.</p> <p>2) We reserve the right to charge for excessive image quality adjustments resulting from your staff overriding image quality warning messages from the imaging software. We will work with you to try to reduce the number of rejects for poor image quality before assessing any additional charges.</p> <p>3) eDOC Innovations supports a variety of forward collection endpoints. Credit unions who desire to process forward collection items directly through the Federal Reserve or another endpoint can obtain pricing through a quote from eDOC Innovations.</p>	

## REMOTE DEPOSIT CAPTURE (OPS FEES)\*

	One Time Charges	Monthly
<b>RDC File Posting Services</b> <i>(max 4 postings daily) Operations fees only; does not include applicable RDC vendor fees</i>	\$500	Urban FT = \$3.00/file eDOC (posting only)= \$1.25/ file eDOC (posting with CUA MobileApp ) = \$1.25 / file
<b>RDC-IQ (near real-time) Posting Services</b>	\$500	\$25/month
<b>New Vendor for RDC</b>	Custom Bid	Custom Bid

## NETWORK SERVICES (CNS)

[www.cuanswers.com/solutions/network-services](http://www.cuanswers.com/solutions/network-services)

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Hardware, Software and Services from Dell, Cisco, IBM, VMware, Microsoft and many other leading IT vendors. Call for information and pricing today.	One Time Charges	Monthly
<b>Complete Care Network Management</b> (Comprehensive technology mgmt. services bundled with unlimited support)	Quote Provided	Quote Provided
<b>Complete Care Essentials</b> (End-to-end technology management solution for CUs under \$30M in assets, 1 location, 10 staff members)	\$1,000	\$500
<b>Data BP Gen 3 Business Continuity Appliance with Offsite Data Storage</b>	Quote provided	Quote provided
<b>Firewall Management SMB series with gateway AV, Anti-Spyware and Intrusion Detection and On Demand Reporting</b>	TBD	\$99 (minimum)
<b>Firewall Management Enterprise series with gateway AV, Anti-Spyware and Intrusion Detection and On Demand Reporting</b>	TBD	\$249 (minimum)
<b>Managed Email Security</b>	TBD	\$99 (minimum)
<b>Secure Remote Access</b> (VPN remote office strategy, deployment and support)	\$400	\$49 (minimum)
<b>Virtual Branch Disaster Recovery Service</b>	\$300 (minimum)	\$30 (minimum)
<b>Presence Tech Onsite or Virtual Support</b>	n/a	Quote provided
<b>Virtual Environment Management</b>	n/a	\$200 (minimum)
<b>Windows Server Management</b>	TBD	\$49 (minimum)
<b>Workstation Patch Management with Reporting</b>	n/a	\$12 (minimum)
<b>GUAPPLE</b>	\$589/unit	\$29
<b>GWEED- (combined Guapple and iSweep for new purchases after 10-1-12)</b>	\$699/unit	\$45
<b>iSweep</b>	\$475/unit	\$34
<b>Zix Email Encryption</b>	\$1,200 setup (min.)	\$850 + \$25/user annually
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# XTEND SERVICES (see Xtend pricing guide for additional pricing details)

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BOOKKEEPING	One Time Charges	Monthly/Recurring
<b>Base Service</b> (Daily Share Draft, ACH, and EFT reconciliation, settlement and exception reporting.)	\$350 - \$500	\$150 - \$550 / week
<b>Stand-in Support</b> (Short-term support for holidays, vacations and staffing shortages.)	\$250	\$35 / month \$50 / day for Basic \$65 / day for Custom
<b>Services A La Carte</b> (Customized daily / weekly / monthly back office support services.)	Quote Provided	Quote Provided
<b>5300 Call Report Services</b> (Configuration of 5300 in CU*BASE and assistance with 1st quarterly upload; assistance with subsequent quarters optional.)	\$995 - \$2995	\$450 - \$650 / quarter
<b>5300 Call Report Services (stand-in)</b> (Short-term support for your 5300 Call Report needs for holidays, vacations and staffing shortages.)	\$995 - \$2995	\$650 / quarter
<b>CU*BASE Conversion Support</b> (Bookkeeping service for up to 90 days for new CU*BASE conversions.)	\$4000	n/a
<b>EFT Plastic Support</b> (Bookkeeping support with plastic-related projects, research and network issues.)	Quote provided	Quote provided
<b>Bookkeeping Tune-Up</b> (A specialized review of daily, monthly & quarterly bookkeeping tasks, policies and procedures, including assistance with CU*Base tools used during these processes.)	\$2500	Quote provided
<b>Lockbox</b> (Credit card payments posted and processed through a dual control system.)	\$2500	\$155/month \$0.77/item
<b>Investor Reporting &amp; Escrow Administration</b> (Reconciliation, escrow analysis and payment, agency reporting for Fannie Mae, Freddie Mac and FHLB portfolio loans.)	Quote provided	Quote provided
<b>Portfolio Conversion</b> (Project management for the conversion of portfolios from a third-party service to CU*BASE.)	Quote provided	Quote provided
<b>Investor Reporting (standard participation)</b> (Monthly settlement of standard-participated loan portfolios.)	Quote provided	Quote provided

CONTACT CENTER	One Time Charges	Monthly/Recurring
<b>Branch XT</b> (inbound member support; CU determines overflow/after -hours/full service)	\$1,500*	\$75/month + \$2.75/call
<b>Core Direct</b> (Inbound loan lead hotline - Xtend begins the application process by feeding them directly into CU*BASE)	\$1,500*	Starting at \$75/month plus \$2.75/call and other application fees
<b>Branch ST Outbound Calls</b> (targeted phone calls to members based on a pre-defined schedule of activities)	\$1,500*	\$75/month + \$2.50/call
<b>Branch ST Self-Service</b> (Weekly call lists for your outbound campaigns, so you can call members yourself)	\$1,500*	\$75/month

## XTEND SERVICES

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<b>Ready-Made Call Campaigns</b> (Outbound call campaigns based on pre-defined topics, audiences and scripts.)	Quote provided	Quote provided
<b>CU*BASE Conversion Support- Inbound</b> (Post-conversion inbound member support, to help work through any issues members might be having.)	\$1500*	Quote provided
<b>CU*BASE Conversion Support - Outbound</b> (Pre-conversion outbound member contact. Client provides any call and email lists.)	\$1500*	\$2.50/call
<b>Disaster Recovery Support – Inbound</b> (Inbound member service to provide top-notch service during significant branch outages.)	\$1500*	\$45 / month retainer \$4 / call \$3500 / declaration \$1500 premium if longer than 5 days
<b>Web Chat</b> (Web chat within It's Me 247 and/or your website, with interactions handled by Contact Center agents. Outbound calls are made when members require advanced authentication for support.)	\$1500*	\$50 / month \$2.50 / chat \$2.50 / outbound call
*Setup fees are discounted by \$500 for each consecutive order. After three orders, all setup fees are waived.		

COMMUNICATIONS (ONGOING & CAMPAIGNS)	One Time Charges	Monthly/Recurring
<b>Member Reach</b> (Targeted emails to members based on a pre-defined schedule of activities. Includes eInfo and Online Banking Community messaging.)	\$1000	\$300 / month \$0.02 / email
<b>Member Reach Plus</b> (An add-on to Member Reach. Leverages member interaction rates to deliver targeted marketing.)	\$200	\$75 / campaign \$0.02 / email
<b>HTML eStatement Notifications</b> (Interactive eStatement Notifications, delivered via HTML email.)	\$100	\$50 / month \$0.05 / email
<b>eNewsletters</b> (An online newsletter in partnership with I Make News, Inc.)	\$300	Starting at \$250 / month
<b>Custom Messages</b> (Customized, targeted electronic messages to members. Includes data mining and execution.)	\$100	\$0.02 / email
<b>Multi-Channel Campaigns</b> (A one-time custom campaign. Includes audience, content, channels and execution.)	Starting at \$300 (quote provided)	\$0.02 / email \$2.50 / call Print & postage quotes provided if applicable
<b>Quick Pick Campaigns</b> (Pre-built content and audiences for commonly requested topics branded to your CU – drives quick execution and return.)	\$200	\$0.02 / email

## XTEND SERVICES (see Xtend pricing guide for additional pricing details)

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<b>RevGen Campaigns</b> ( <i>Bundled campaigns, starting at four campaigns per year.</i> )	\$1,000 Annually \$200 per additional campaign, max 2	\$0.01 / email Quote Provided for additional channels
<b>Letter Check</b> ( <i>Printed checks and promotional letters for targeted CU credit card holders; additional marketing channels available upon request.</i> )	\$500	Print & postage quotes provided
<b>CLIP – Credit Limit Increase Program</b> ( <i>Non-traditional lending focus to increase your members' card limits; includes CU*BASE tasks and campaign preparation</i> )	\$500	\$2.75/increase \$0.02/email

COMMUNICATIONS (JOURNEYS & DIGITAL)	One Time Charges	Monthly/Recurring
<b>Losing the Love</b> ( <i>Member retention program focused on identifying and retaining members with decreased activity.</i> )	\$1000	\$300 / month \$0.02 / email
<b>New Member Onboarding</b> ( <i>A series of personalized communications to welcome new members and connect them to products/services they haven't yet enrolled in.</i> )	\$1000	\$300 / month \$0.02 / email
<b>Member Journeys</b> ( <i>A guided series of communications designed to add value to member's lives by promoting specific solutions that complement their engagement with the CU; i.e. New Loan Journey, Payment Reminder Journey, etc.</i> )	\$1,000	Quote Provided
<b>OLLE- OnLine Lead Engine</b> ( <i>Our online contest software, that converts digital interactions into leads.</i> )	n/a	\$300 / contest, OR \$3000 / year
<b>Managed OLLE</b> ( <i>Individual online contest campaigns, managed by us and utilizing our OLLE software. Includes contest content, emails and loan lead follow-up phone calls to members.</i> )	\$500 - 600 / campaign	\$0.02 / email \$2.50 / call
<b>Social Media Management</b> ( <i>Manage multiple social media , have us manage them for you through our convenient Social Media Portal.</i> )	\$400	Starting at \$150 / month
<b>Social Media Consultation</b> ( <i>In-person consultation.</i> )	\$600 + T&E	n/a
<b>Marketing Plan Consultation</b> ( <i>see Xtend Pricing Guide for Description</i> )	n/a	n/a



Analytics Booth enables you to understand your credit union better than ever before. You'll never have to say you don't know the latest information happening right now. Your credit union's vitals are at your fingertips.

[cuanswers.com/solutions/asterisk-intelligence/analytics-booth/](http://cuanswers.com/solutions/asterisk-intelligence/analytics-booth/)



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Data Analytics	One Time Charges	Monthly/Recurring
<b>Custom Target Audience</b> (A list of your target audience with custom inclusions and exclusions.)	\$75 / hour	n/a
<b>Marketing Scorecard</b> (A brief, two-page analysis of your credit union's hidden marketing opportunities.)	\$75	n/a
<b>Enhanced Campaign Reporting</b> (An in-depth analysis of your recent marketing efforts.)	\$100 / hour	n/a
<b>Call Center Scorecard</b> (An analysis of your calls and callers for the most recent month.)	\$75	\$50/Scorecard
<b>Managed Campaign Data</b> (Delegated data management for an upcoming campaign.)	\$500	n/a
<b>Direct Deposit and Checking Account Call Reporting</b> (A report on direct deposit and checking account call campaign effectiveness.)	\$300	n/a
<b>CD and Money Market Call Reporting</b> (A report on CD and money market call campaign effectiveness.)	\$300	n/a
<b>Losing the Love Enhanced Reporting</b> (Additional reporting on your Losing the Love campaign, focusing on whether contacted members are changing behavior or have closed their accounts.)	n/a	\$100/behavior
<b>New Member Reporting</b> (A demo, discussion and configuration of Wrap Up Code technology in CU*BASE.)	\$800	n/a
<b>Custom Marketing Analysis</b> (A custom report on your New Member Onboarding processes.)	\$500	\$150/month
<b>Email Performance Analysis</b> (A deep dive into the effectiveness of the marketing emails sent to members by Xtend on behalf of your credit union.)	\$500 (one month) \$1000 (one quarter) \$1500 (one year)	n/a
<b>Know Why Your Members Call</b> (Wrap Up Code Study) (An analysis of interactions with members, leveraging Wrap Up Code data in CU*BASE to reveal caller patterns and provide insight.)	\$500 (one month) \$1000 (one quarter) \$1500 (one year)	n/a
<b>Know Who to Contact</b> (A report outlining potential target audiences for marketing campaigns, based on a review of service performance, member availability and more.)	\$750 / analysis	n/a
<b>Know What to Market</b> (A report on two products/services to market, based on a review of data-indicated growth opportunities and membership needs.)	\$750 / analysis	n/a
<b>Know Your Online Credit Card Holders</b> (A report on online credit card holders' behaviors, determining which products/services they are likely to need.)	Starting at \$800	n/a
<b>Know Your Outside Credit Card Holders</b> (A report on credit card holders' tradeline data and payment behaviors to determine which products/services they are likely to need.)	Quote provided	n/a



## XTEND SERVICES (see Xtend pricing guide for additional pricing details)

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<b>Sales Tracker Consultation</b> (A series of two meetings designed to leverage the CU*BASE tracker functionality)	\$800	n/a
<b>Sales Tools Crash Course</b> (A two-hour meeting to walk thru CU*BASE dashboards and other sales-related tools)	\$500	n/a
<b>Frequent Caller NSP Program</b> (Helps you harness the power of your Wrap Up code data; see Xtend Pricing Guide for more detail)	\$300	\$150/month \$1.00/nsf
PARTNERS & PROFESSIONAL SERVICES	One Time Charges	Monthly/Recurring
<b>Shared Branching</b> (Marketing and oversight of the CU*BASE Shared Branching Network Consortium, allowing members to perform transactions at branches across the US.)	\$500	\$450 / year
<b>Cooperative Liquidity Exchange</b> (A digital marketplace of investment opportunities with credit unions and CUSO partners, including CDs, loan participations and more.)	\$200 / post	n/a
<b>Mobile Coupon App</b> (By Relevant Solutions. Mobile shopping coupons for members. Can be embedded in a credit union's mobile app or used via a standalone app.)	Starting at \$100	Quote provided
<b>Digital Signage</b> (By Revel TV. Digital signage installation, content creation and delivery via Channel Valet, Revel TV's cloud-based software.)	Quote provided	Quote provided for hardware installation; Starts at \$150 / month for Channel Valet
<b>Two-Way Text Messaging</b> (Text-enable your existing landlines for member contact. Includes PC, browser and app management for your team.)	Quote provided	\$125 / month for up to 2 lines; \$100 / month per additional line
<b>Board Planning Session Facilitation</b> (We'll help facilitate annual board planning sessions and other strategic events.)	T&E	n/a
<b>Marketing / Member Communication Consultation</b> (On-site consultation by our management team, focusing on CU*BASE cross sales, tiered services, contact center execution, business development and communication strategies.)	Starting at \$1000 / day + T&E	n/a
<b>Bookkeeping Consultation</b> (On-site consultation by Xtend Bookkeeping management team leaders. Focusing on CU*BASE optimization, loan servicing and back-office productivity.)	\$1000 / day + T&E	n/a



# Xtend

Customize your Online Banking Community (OBC) stories and keep your members informed through Xtend Member Reach!

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**Contact Information:**

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[cuanswers.com](http://cuanswers.com)

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