

The background is a stylized illustration of a night landscape. It features dark, layered mountains in shades of blue and grey. A winding river flows through the center, and a small orange tent is pitched on a grassy bank in the lower right. The sky is dark blue with numerous small white dots representing stars.

Deep Dive on the Future of the CU*BASE UI

Brian Maurer, EVP Software Development

Dawn Moore, EVP Client Experience

A New Platform for CU*BASE

- ▶ Working with Rocket Software (makers of LegaSuite) to put CU*BASE in a browser window
- ▶ Converting **18,000 panels**
 - About half are custom
- ▶ Basic one-to-one conversion
 - Bells and whistles coming in future evolutions
- ▶ Targeting fall 2024!



Why are we doing this?

- ▶ Leveraging large screen sizes
- ▶ Expectation for a “web” look and feel
- ▶ Foundation for future evolution
 - Embracing new technologies
- ▶ Planning for an eventual sunset of our current LegaSuite platform



Spotlight on...

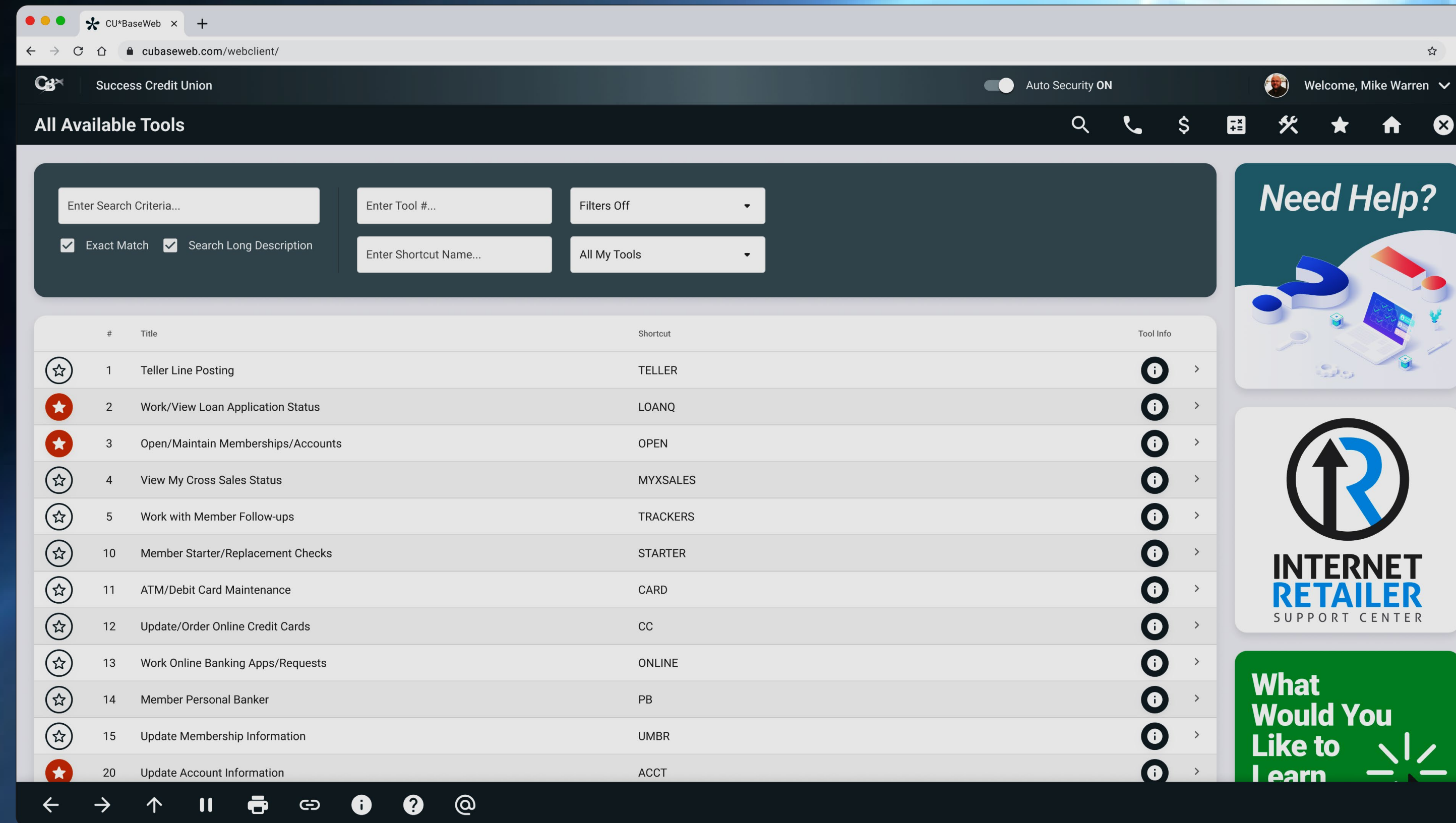
Introducing the New Face of CU*BASE:



Design mockup only; all details subject to change

Spotlight on...

Introducing the New Face of CU*BASE:



Design mockup only; all details subject to change

Spotlight on...

Introducing the New Face of CU*BASE:



The screenshot displays the CU*BASE web client interface for an individual account. The browser address bar shows 'cubaseweb.com/webclient/'. The page title is 'Individual Account'. The user is logged in as 'Mike Warren' with 'Auto Security ON'.

Individual Account Summary:

- JOHN Q MEMBER** (GOLD-ING Member with 500 Points!)
- Account #: 2001 | Name ID: ME | Corp ID: 01
- Opened: Jan 01, 1960
- SSN/TIN: 123-45-6787
- Birthdate: Jan 01, 1950
- Mother's Maiden Name: NONE
- Driver's License: ABD123
- Contact Information: 135 Apple Ave., Suite #1000, Grand Rapids, MI 02222
- Phone #1: 616-363-3331 (Cell)
- Phone #2: 616-111-2222 (Work)
- Email: member@gmail.com

Account Details Table:

Type	Description	Loan Payoff / Current Balance	Loan Payment New Available	Next Pmt / Last Trans / CD Maturity	IRA	P/R	ATM	AFT	FRZ	TRK	ACH	ODP	BOX	J/O
000	SHARE	480.4	3.64	2/11/2022	•	Y	Y	•	0	Y	Y	•	•	Y
001	CHECKING	932.00	4.00	2/09/2022	•	Y	Y	Y	0	•	•	•	•	Y
002	CHECKING	23,176.12	15,307.88-	11/12/2021	•	•	•	•	0	•	•	•	•	•
003	CHECKING	5.13	0.00	2/09/2022	•	•	•	•	1	•	•	•	•	•
028	ESCROW	0.14	0.14	11/12/20221	•	•	•	•	0	•	•	•	•	•
330	CERTIFICATE	598.94	0.00	10/22/2014	•	•	•	•	0	•	•	•	•	•
550	CERTIFICATE	0.00	0.00	0/00/0000	•	•	•	•	0	•	•	•	•	•

Design mockup only; all details subject to change

After the foundation is built...

Some things we're excited about for after the initial rollout

- ▶ Combining data from multiple screens onto one
- ▶ Improvements to workflow and usability
- ▶ Set the foundation for API development
- ▶ 3rd party direct integrations



Planning for CBX Rollout

What'll you see in the next 18 months

- ▶ **Dual development – GOLD & X**
 - For at least 2 releases after CBX rolls out
 - Training, new client conversions, CTE
- ▶ **During 2024 we'll focus more on projects that don't touch CU*BASE screens**

Learn more: open.cuanswers.com/CBX

