

## Highlights from the 8th Annual Corelation Client Conference

This year's nautical-themed client conference was smooth sailing for the clients, vendors, and employees who cruised to Corelation's home of San Diego. The conference was extra special this year for many reasons: not only did we celebrate our Decade of Success, but we shared it with a 49% increase in client attendees, 26% more vendor partners, and 24% more Corelation employees on the roster. Talk about a boatload!



and a local beer tour at Societe Brewing Company and Karl Strauss Brewing Company.

Wednesday morning was all hands on deck at the Manchester Grand Hyatt as 832 people poured into the conference space for the vendor showcase, breakfast, and registration. The hustle and bustle of people meeting as attendees rejoiced

What started out as a cloudy and chilly-for-San Diego day turned into beautiful weather for three social events on Tuesday to kick things off: a golf scramble at Rancho Bernardo Inn, wine tasting at Orfila Vineyards and Winery,

and embraced was much like a family reunion. A team of 50 Corelation ambassadors sporting red shirts guided everyone into the opening session as the 2019 Client Conference set sail.

It all began with a recorded review of highlights from each year we've been in business, including client signings and employee hires to show our growth over the years. Corelation's Chief Revenue Officer, Tim Maron, took the stage to officially welcome everyone, then introduced our founder and Chairman, John Landis. President and CEO Theresa Benavidez thanked everyone for their partnership and shared a message from Chris Conway, CEO of Educational Systems Federal Credit Union: "We believe in you. We believe in John. We believe in your team. We believe in what Corelation stands for." She also shared a glowing report from James Gergen, CEO of CPM Federal Credit Union: "Your team is awesome! We have been very impressed! I thought your core competency was code, but I was wrong. I now think your core competency is people!"

Keynote speaker Mark Sievewright presented "Finding and Securing the Future in a Whole New World of Financial Services."



Presenter Mark Sievewright

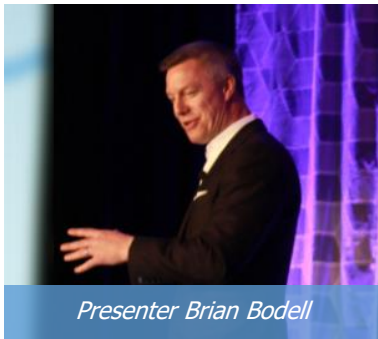
His impressive talk included insight on the digital technology boom, the role he sees artificial intelligence playing in credit unions, and the importance of keeping branches open but mindfully positioning them.

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Presenter Brian Bodell

Brian Bodell, a credit union tech veteran, spoke to the crowd about how Correlation is the disruption and breath of fresh air the credit union industry needs. According to Bodell, KeyStone's modern API and the company's open technology mindset leads

to happy clients, happy employees, and ultimately happy members.

Jim Stickley from Stickley on Security gave another great presentation this year, scaring and sharing with the audience the risks of using autofill features in your browsers. Bottom line, don't let your browser save and autofill credit card information unless you want to get scammed!

A new addition to the presentation lineup this year was a good old-fashioned debate. Going head-to-head in the ring for a friendly battle about blockchain's place in the



Blockchain Debate

financial technology sector were John Best of Best Innovation Group and Jon Ungerland of DaLand CUSO. Best, the advocate, argued that blockchain builds trust, while Ungerland, the adversary, contended the industry should be open to other open API technologies instead of fixating on blockchain.

Correlation's Brent Edwards took the helm and cruised through all of the exciting KeyStone enhancements from the past year while an Oscar-worthy production of *Gilligan's File* aired on the big screens behind him. KeyStone demonstrations included the new work queue sorting and filtering options, customizing the KeyStone main menu, alerts functionality, troubled debt enhancements, the loan move tool, and additions to the loan origination system.

Day one wrapped up with the vendor showcase and cocktail reception. Entertainment was provided by Corelation's own



The KeyTones

KeyTones band, which rocked out while guests mixed and mingled.

Thursday's sessions were divided among technical, operational, executive, and new client tracks. All of the sessions were full of great information.

Newly signed clients eager to learn how to get their staff on board were presented with helpful ideas from Cynthia Spence and Ryan Bobbin from Sandia Labs Federal Credit Union.



Lone Star CU CEO Becky Reed

Incorporating a fun theme and effectively communicating with staff were key takeaways. Lone Star Credit Union shared practical strategies and advice to successfully navigate the project

management side of a core conversion.

Operational track sessions were nautically pun-packed as Correlation employees and credit union speakers presented topics including database management best practices, getting the most from work queues, and the ongoing initiative to refresh and expand KeyStone's loan origination system.

The executive and technical tracks highlighted topics such as the 2018 report library, use cases for interactive scripts, and batch scripting techniques. A special presentation was also given by Greg Smith, President/CEO of PSECU, who stepped down this year after 45 years of dedicated service to the credit union industry.

After two full days of learning, it was time to have some fun at the closing reception just across the foyer where the hustle and bustle took place just hours prior. Clients, vendors, and employees showed up ready to party in their nautical-inspired attire. Some



Centris' Gilligan and Company

even say that Gilligan and Skipper were spotted dancing to Yachty by Nature's jams from the late '70s and early '80s.

We'll be back at the Manchester Grand Hyatt next year, so mark your calendars for May 26-28, 2020! Bon voyage! 🍷

## Certified Partner Spotlight: Connect FSS

It's plain and simple: credit unions need to offer products that provide a great member experience. Connect Financial Software Solutions (FSS), Corelation certified partner and a closing event sponsor for this year's Corelation Client Conference, is an expert at helping credit unions differentiate their digital banking experience with fast, flexible, and efficient service. Connect's customizable solutions deliver a self-service user experience that's designed to attract and retain members.

Connect FSS is a credit union service organization (CUSO). Their software is built by credit unions and is only available for credit unions. Connect's strategic decisions and development path are solely designed with the technological needs of their clients in mind. They're very aware that their success is dependent on their clients' success and their business ideal is the antithesis of a one-size-fits-all model. Credit unions can choose customized solutions that extend the product seamlessly based on future needs. And because Connect's staff has extensive credit union technology, operations, and management experience, they are able to streamline the development process, delivering in months what other providers take years to produce.

Through their mobile app and support of Android™, iOS™, and Kindle™, Connect covers all the digital touchpoints clients require. From making deposits to controlling credit and debit card functions, Connect takes advantage of the capabilities offered by today's smartphones and tablets. Credit union members can open new products, pay bills, transfer funds, and much more. The marketing capabilities of the Connect platform offer credit unions an unsurpassed opportunity to customize offers and alerts to mobile and online digital banking users.

Connect complements KeyStone's flexibility and efficiency in the digital channel. While the functionality of the two systems focuses on different aspects of a credit union's operations, the deep integration between the two results in a greater member experience that makes the partnership between Corelation and Connect extremely powerful.

"This core integration leverages Corelation's industry-leading KeyBridge interface, which allows Corelation's credit unions to provide an incredible range of capabilities via the digital banking channel," says Grant Parry, President of Connect.



Connect's integration via KeyBridge has streamlined the digital channel to best fit the Corelation data model. Their account opening and lending solutions deeply integrate with KeyStone to pull ChexSystems and credit reports, and to run credit calculations.

Providing advanced features within a digital channel strategy is just the beginning for Connect's clients, not the destination. Although there are similar products and services in the credit union marketplace, it's important to recognize that Connect's deep connections to KeyStone and Corelation's third-party service providers offers clients the tools to make their digital channel offering unique while offering an intuitive member experience.

Connect's strong partnership and proven commitment to our mutual clients makes them a solid choice to take our clients' digital banking experience to the next level. ▣

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### Upcoming Training and Seminars

- |                              |  |
|------------------------------|--|
| July 18<br>12-1:30 p.m. PST  | <b>Free Session!</b><br>Queues Webex sponsored by<br>           |
| Aug. 8,<br>12-1:30 p.m. PST  | Collections & Charge-Offs in<br>KeyStone Webex sponsored by<br> |
| Aug. 7-9                     | Jaspersoft Studio Reports<br>Training  |
| Aug. 15-16                   | What to Expect When You're<br>Converting Conference  |
| Sept. 12<br>12-1:30 p.m. PST | Security Functionality in<br>KeyStone  |
| Sept. 17-20                  | Interactive & Batch Scripting<br>Training  |



## Employee Profile: Rena Rowe, Project Management

With summer blockbuster season upon us, 2019 has proven to be the year with the most superhero movies in cinema history. In this year of the caped crusader, we'd like to introduce Corelation's own wonder woman, Rena Rowe! The Senior Project Manager extraordinaire has led more than 20 conversions to KeyStone in the last four years. That's nearly one-third of Corelation's live clients in that timeframe! Rena's exceptional problem-solving and organizational skills have saved the day time and time again.



Rena likes to tell people that she was always meant to be a project manager. In elementary school, she had a plan to run away from home, but the plot was foiled when her mother found the written plan in one of Rena's pockets while doing laundry. She credits her parents with encouraging her creativity and imagination during her childhood in Detroit, MI. Rena recalls asking lots of questions at a young age, and her father always responded, "Look it up." His response contributed greatly to her approach to problem solving and her drive for knowledge. Rena went to Iowa State University, receiving her bachelor of science degree in marketing in 1997. In 2013, she received her MBA from Webster University as well as her Project Management Professional (PMP) certification.

After 15 years of project management experience in mostly technical fields, Rena came to Corelation. She saw right away that the credit union industry is a tight-knit group where everyone knows everyone. Although Rena didn't have a credit union background, the team respected her project management experience and allowed her to gain financial services knowledge along the way. She's proud that she hit the ground running and came up to speed quickly.

As a Project Manager, Rena's primary responsibility is to make sure a conversion project runs smoothly. She works closely with credit unions, vendors, consultants, and members of several Corelation departments. Collaborating with different people and personalities on each project makes her days interesting and fun. Rena says, "There are a lot of moving parts and it can be challenging keeping everyone on track, but I love the sense of accomplishment at the end of each successful conversion." Her largest project to date is Sandia Laboratory Federal Credit Union,

a \$2.3 billion credit union that was running on two cores before their conversion to KeyStone. Succeeding despite each project's unique challenges makes her job that much more rewarding.

Rena's positive outlook and fun approach to work is infectious. She says the corporate culture is what she loves most about Corelation. Management encourages employees to be themselves, which led Rena to start Wig Wednesday, a tradition that invites employees to wear fun wigs to work each

Wednesday. She also sings with Corelation's band, The KeyTones. She feels very fortunate to be able to say that she loves the people she works with and that she looks forward to coming to work every day.

Rena describes herself outside of work as a social butterfly. She loves getting together with friends, going to concerts and movies, hiking, and traveling. She also volunteers for NAMI, the National Alliance on Mental Illness, whose mission is to build better lives for the millions of Americans affected by mental illness.

Thank you, Rena, for all you do for our clients, fellow Corelatives, and the community. You're our hero! 🦋

### Welcome, New Clients

*(Through June 1, 2019)*

#### Founders Federal Credit Union

Bruce Brumfield, President/CEO

\$2.4 billion in assets

Converting July 2020

Lancaster, SC

#### Educational Systems Federal Credit Union

Chris Conway, President/CEO

\$1 billion in assets

Converting November 2020

Greenbelt, MD

## News and Events

### Client Spotlight

Bellwether Community Credit Union is transitioning CEO leadership from longtime leader Michael L'Ecuyer to Nathan Saller on Oct. 1, when L'Ecuyer retires. L'Ecuyer was recently named Greater Manchester Chamber of Commerce's 2019 Citizen of the Year in honor of his extensive community activities. L'Ecuyer has served in key leadership positions at organizations including the CUNA board of directors, America's Credit Union Museum, Northeast Delta Dental, City Year New Hampshire, and others. Saller's 22 years of experience at the credit union and glowing recommendations from the board of directors will serve him well at Bellwether's helm. Read more at [NHBusinessReview.com](http://NHBusinessReview.com).



### Community Spotlight

Credit Union of New Jersey recently donated the first of three \$25,000 installments to SERV Behavioral Health System to benefit their upcoming state-of-the-art SERV Technology Center. SERV helps adults and children recover from and cope with mental illnesses, addictions, and developmental disabilities. The SERV Technology Center will provide SERV's staff and consumers with technology, financial, and professional training so they can improve their daily lives. Read more at [CommunityNews.org](http://CommunityNews.org).



**Credit Union  
of New Jersey**

### Client Spotlight

The Pennsylvania Credit Union Association (PCUA) and the New Jersey Credit Union League (NJCUL) entered into an agreement creating one of the largest regional credit union trade associations in the country. According to Jeff DeBree, PCUA Board Chair and President & CEO of Penn East Federal Credit Union, the new organization "will be able to invest more into products and services to help our credit unions grow and flourish." Andy Jaeger, New Jersey Board Chair and President/CEO of the Credit Union of New Jersey, said the two organizations "will be better together and provide compelling value and ROI to our credit unions." Read more at [PANJCreditUnions.com](http://PANJCreditUnions.com).

### Client Spotlight

Park View Federal Credit Union kicked off its 50th anniversary in style at the Annual Neighborhood Connection event on June 6 with games, catered food, and entertainment for all ages. This event was attended by over 1,500 Park View members. To celebrate 50 years of Neighbors Serving Neighbors®, Park View is giving back to their members and community with 50 acts of kindness throughout 2019. Visit [Park View's Facebook page](#) to learn more about upcoming community events and opportunities.



## Thank You, Conference Sponsors

**W**e'd like to recognize our partners who generously supported the 2019 Corelation Client Conference. Thank you for your support!

**Note:** Certified partners appear with a blue asterisk (\*).

### **Premium Sponsors**

Closing Reception:

- Connect FSS\*
- Diamond Communication Solutions\*
- MEA Financial
- SwitchThink Solutions\*

Platinum Sponsor:

- SMA Technologies\*

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Gold Sponsor:

- Xpress Data, Inc. (XDI)\*

Associate Sponsor:

- Doxim\*

Silver Sponsor:

- Wycom Systems, Inc.\*

Bronze Sponsor:

- PSCU\*

Founding Partner Sponsor:

- Wescom Resources Group\*

### **Brewery Event (Tuesday, May 21)**

Reception:

- IMS, Inc.\*

Shuttle:

- BillingTree®\*

Giveaway:

- Cash Flow Management (CFM)\*

### **Winery Event (Tuesday, May 21)**

Lunch:

- IMM\*

Shuttle:

- Narmi

Giveaway:

- Ascensus

### **Golf Event (Tuesday, May 21)**

Beverage Cart

- FICS®\*

Lunch:

- Information Management Solutions, Inc.\*

Dinner:

- Advanced Fraud Solutions\*
- mSHIFT, Inc.
- Lumin Digital

Shuttle:

- Lanvera

Golf Balls:

- TeleVoice\*

Awards:

- FICS®\*

Giveaway:

- Information Management Solutions, Inc.\*

Golf Hole Sponsors:

- PSCU\*
- Best Innovation Group
- Xpress Data, Inc. (XDI)\*
- Enacomm, Inc.\*
- Enacomm, Inc.\*
- Enacomm, Inc.\*
- Enacomm, Inc.\*

### **Conference (Wednesday, May 22)**

Keynote Speaker:

- Enacomm, Inc.\*

Video Sponsor:

- Wescom Resources Group\*

KeyStone Commercials:

- IMS, Inc.\*
- Best Innovation Group
- SRMS Network Technologies

Lanyards:

- eCU Technology\*

Pens:

- InfoIMAGE

Conference Giveaway:

- Cubus Solutions

Device Wipes:

- BDI®\*

Breakfast:

- Pure IT Credit Union Services\*
- Q2 Software, Inc.\*

Morning Break:

- CUNA Mutual Group
- Bankjoy\*
- Cards on the Spot by Matica

Lunch:

- IMSI\*
- Millennial Vision, Inc.\*
- Glory Global Solutions

Afternoon Break:

- Alogent\*
- Hyland\*
- DaLand CUSO

Cocktail Reception:

- NCR\*
- Redi Enterprise Development, Inc.
- Buzz Points

**Conference (Thursday, May 23)**

Breakfast:

- ABCorp Custom Card Systems
- Texas CU Services, LLC

Morning Break:

- Epson America
- Eltropy
- Deluxe Financial Services\*

Lunch:

- CO-OP Financial Services\*

Afternoon Break:

- Alkami Technology
- Toolcase LLC
- Avtex

**Closing Reception (Thursday, May 23)**

Photographer:

- Stickley on Security\*

Entertainment Sponsor:

- TransUnion

**Certified Partners**

*(Through June 1, 2019)*

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Alogent (Formerly Bluepoint Solutions®) . . . . .	<a href="http://alogent.com">alogent.com</a>
Bankjoy . . . . .	<a href="http://bankjoy.com">bankjoy.com</a>
BillingTree® . . . . .	<a href="http://mybillingtree.com">mybillingtree.com</a>
Business Data, Inc. (BDI®) . . . . .	<a href="http://businessdatainc.com">businessdatainc.com</a>
Cash Flow Management (CFM) . . . . .	<a href="http://whycfm.com">whycfm.com</a>
ClickSwitch . . . . .	<a href="http://clickswitch.com">clickswitch.com</a>
Connect FSS . . . . .	<a href="http://connectfss.com">connectfss.com</a>
CO-OP Financial Services . . . . .	<a href="http://co-opfs.org">co-opfs.org</a>
Deluxe Financial Services . . . . .	<a href="http://fi.deluxe.com">fi.deluxe.com</a>
Diamond Communication Solutions . . . . .	<a href="http://dmsolutions.com">dmsolutions.com</a>
Digital Insight (NCR) . . . . .	<a href="http://ncr.com">ncr.com</a>
Doxim . . . . .	<a href="http://doxim.com">doxim.com</a>
eCU Technology. . . . .	<a href="http://ecutechnology.com">ecutechnology.com</a>
Elan Financial Services . . . . .	<a href="http://elanfinancialservices.com">elanfinancialservices.com</a>
Enacomm, Inc. . . . .	<a href="http://enacomm.net">enacomm.net</a>
FICS® . . . . .	<a href="http://fics.com">fics.com</a>
First Line Insurance . . . . .	<a href="http://firstlineins.com">firstlineins.com</a>
HomeCU, LLC . . . . .	<a href="http://homecu.net">homecu.net</a>
IMM . . . . .	<a href="http://immonline.com">immonline.com</a>
IMS, Inc. . . . .	<a href="http://imsdirect.com">imsdirect.com</a>
IMS Integration (IMSI) . . . . .	<a href="http://imsintegration.com">imsintegration.com</a>
Information Management Solutions, Inc. . . . .	<a href="http://cusolution.com">cusolution.com</a>
MeridianLink . . . . .	<a href="http://meridianlink.com">meridianlink.com</a>
Millennial Vision, Inc. (MVi) . . . . .	<a href="http://mviusa.com">mviusa.com</a>
OnBase by Hyland Software, Inc. . . . .	<a href="http://onbase.com">onbase.com</a>
Payveris . . . . .	<a href="http://payveris.com">payveris.com</a>
PSCU . . . . .	<a href="http://pscu.com">pscu.com</a>
Pure IT Credit Union Services . . . . .	<a href="http://pureitcuso.com">pureitcuso.com</a>
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Stickley on Security (SoS) . . . . .	<a href="http://stickleyonsecurity.com">stickleyonsecurity.com</a>
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TeleVoice . . . . .	<a href="http://televoice.com">televoice.com</a>
Trellance . . . . .	<a href="http://trellance.com">trellance.com</a>
Wescom Resources Group (WRG) . . . . .	<a href="http://wescomresources.com">wescomresources.com</a>
Worldpay, Inc. (Formerly Vantiv) . . . . .	<a href="http://vantiv.com">vantiv.com</a>
Wycom . . . . .	<a href="http://wycomsystems.com">wycomsystems.com</a>
Xpress Data, Inc. (XDI) . . . . .	<a href="http://xdi.com">xdi.com</a>



# Conversiongram



Networking at the Vendor Showcase



Cheers and Beers



Learning and Sharing



Hugging Hosts



KeyTones Finishes on a High Note



Wine Tasting at Orfila Vineyards



Gallivanting Golfers



Educational Insights



Wednesday Sessions



Hustle and Bustle at the Hyatt



## A Note from the President

**J**ust sit right back and you'll hear a tale, A tale of a fateful trip... and so began Gilligan's famous voyage. A three-hour tour among strangers became a testament of friendship and courage as the castaways relied on each other to overcome every difficulty on the island. If there's one takeaway from our conference theme *Gilligan's Island*, it's the power of relationships. At Corelation, we know that our commitment to the community is the reason we are successful. Our conference is a beautiful reminder of the community that grows stronger year after year between our clients, vendors, and staff.



Community has made all the difference for our clients and vendors. In every one of our events, you can see credit unions sharing ideas to propel each other forward and build a framework of support. Our vendor ecosystem brims with innovative solutions that give our clients limitless possibilities. Thank you so much for believing in us and for joining us on this incredible journey. We are thrilled to share a connection so deep that it can even be found in our baseline code. After all, we included our clients and vendors in the initial phase of our software development and we continue to listen to you every day so we can make

changes that support your business objectives. I am proud of everything we have accomplished together and I am excited for great things on the horizon.

Year after year, our clients and vendors inspire us by serving the community. In keeping with these credit union values, we have been making focused efforts to give our staff opportunities to serve greater causes. While our employees have organized collections in past years for charities including the USO, Just in Time for Foster Youth, and the San Diego Food Bank, our focus this year has been for them to have greater involvement. We challenged our staff to take ownership of our sponsorship for the Rady Children's Hospital Dream Big 5k Walk in May. They showed overwhelming support week after week and rallied to raise \$13,000. At the event, our staff walked with families and volunteers to show their support in person. Our staff's efforts to put the credit union philosophy into action show that our synergy with our partners goes beyond the walls of our building. In the near future, our annual teambuilding exercise will devote a day to performing different acts of community service so we can extend our reach as far as possible.

We are committed to deepening our community both inside and outside the office. When you partner with us, you are joining a movement that is so much more than the sum of its parts. Thank you for the opportunity to support you and show our appreciation by giving back.

Sincerely,

Theresa Benavidez  
President/CEO, Corelation, Inc.

Corelation is proud to have sponsored the Rady Children's Hospital Dream Big 5k Walk on May 4! We raised \$13,000 for this worthy cause, placing us the first in the credit union sponsor division. Below are a few pictures of our staff at the walk:



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