keynotes™

Highlights from the 12th Annual Corelation Client Conference

Attendees flocked to Fightertown USA as Corelation's 12th Annual Hybrid Client Conference took off at the Manchester Grand Hyatt San Diego. This year's conference paid tribute to *Top Gun: Maverick* with the theme of "Top Core II", promising an exciting and engaging event for all participants.

The Conference brought together a remarkable gathering of over 1,500 credit union attendees, vendors, and Corelation employees, joining both in person and virtually. The event commenced with a warm welcome from Corelation's visionary Chairman & Founder John Landis and Corelation's inspiring CEO Theresa Benavidez. Corelation President Rob Landis followed with an opening address that exuded a strong sense of gratitude and appreciation for the attendees. His heartfelt words emphasized the collective effort of the community coming together to strive for something greater.

Keynote speaker Mike Kelly, Founder & CEO of TeamOnUp, delivered a compelling message centered around the evolving nature of humanity in the workplace, highlighting the importance of uniting your people with your organization's mission.

The first day continued with general sessions that included QCash CEO Seth Brickman teaching us what nuclear submarines and small dollar loans have in common and Jim Stickley sharing real world examples of the latest cybersecurity threats. The day concluded with the highly anticipated fireside chat with Corelation's executive team and the annual favorite "Year in Review" that highlighted which new features and KeyBoard winners took flight this year, capturing the enthusiasm of the attendees.

The Vendor Showcase also left attendees inspired as it truly embodied the essence of partnerships and innovation. As the day drew to a close, a cocktail reception provided a delightful setting for attendees to relish each other's company.

The last day of the conference offered a variety of topics, where each attendee could choose their own path on the Executive Track, Operational Track, Technical Track, or New Client Track.

The executive sessions delved into the utilization of artificial intelligence to address the rising costs associated with fraud and adapting technology to accommodate remote work. In the operations track, the emphasis was on exploring innovative approaches to harness the power of KeyStone, with guest speakers from Founders FCU, DuGood FCU, and Park View FCU. The technical track provided a comprehensive look at best practices and methods to enhance the KeyStone experience. New clients learned valuable insights and recommendations for a successful conversion, presented by Corelation team members and recently converted Members Heritage CU.

Following the conclusion of the sessions, attendees assembled on the flight deck of the USS Midway for the closing reception. Embracing the "Top Core II" theme, guests were treated to live music, an on-deck flight simulator, and even a Tom Cruise impersonator meet & greet. The guests reveled in the evening, fondly reminiscing about another unforgettable event.

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Note from the President

Friends and Colleagues,

Each of you reading this knows firsthand how much effort it takes to accomplish great things. If you think back to virtually any challenge in your career or personal life, of course you'll remember the moment that it all came together – receiving the diploma, getting the promotion, reaching the literal mountaintop. But you'll also reflect on all the unglamorous moments that came before it – the late nights spent studying, the times you went the extra mile at your job, the choice to keep climbing one step at a time. And I'm guessing that even for the individual achievements in your life, you'll recognize all the teamwork that went into reaching those goals – the friends, family, and colleagues that supported you along the way.

Well Corelation is in the business of accomplishing great things. We challenge ourselves to perform flawless conversions, to adapt to the unique demands of each project, to maintain our passion for service day after day. And once a year, to host a conference that is equal parts expo and celebration. This year's conference was the largest in our history, and the amount of effort and teamwork that went into the undertaking was proportionately groundbreaking. I stand in awe and admiration of all of those who brought it to fruition, including the many vendor partners and clients who contributed time, money, and genuine care before, during, and after the event itself.

But I am especially proud of my fellow Corelatives, and I am thankful for this platform to share that pride with all of you. This team is made up of truly amazing individuals, each of whom is deserving of acknowledgement and praise. But while I can't call them all out here, I can point to their collective achievements. Not only do they nail conversions and projects and inquiries and enhancements every day, but they also found time to plan and host a heck of a party.

What a privilege it is to contribute what I can to this team. It gives me confidence that there is no task too large for this group, no project too complex. I can't wait to see what they'll accomplish next.

Rob Landis, President, Corelation Inc.

Employee Spotlight:
Lawrence Stevens, Supervisor of Event Planning

Behind every successful corporate event lies the tireless efforts of an event planner. Meet Lawrence Stevens, the driving force behind every event at Corelation.

With years of experience in event management, the California native has worked at a public relations firm, a real estate investment company, and two event app companies. While working in real estate and the two event app companies, he had the opportunity to consistently travel and be onsite at various events, which helped his career in event planning flourish.

Initially joining the team as an Event Planner in March 2020 and now holding the position of Supervisor, Lawrence is responsible for managing all advisory board meetings, CEO & CTO Forums, and the biggest event of the year: the annual Corelation Client Conference. In addition, he organizes and oversees all employee events, including week-long events in the springtime and in the fall attended in-person by all employees.

"I deeply appreciate the collaborative culture of this organization, where everyone is motivated to work together and achieve goals efficiently. As a result, I have been able to form strong and enduring friendships here, for which I am immensely grateful."

Outside of work, Lawrence's life is primarily centered around basketball, creating music, and spending time with his beloved beagle, Buddy. Apart from his hobbies of watching Lakers games and taking his dog to the beach, Lawrence has a keen interest in traveling. He even spent the summer of 2011 in New Zealand working for an event planning agency, which ignited his passion for both travel and event planning as a career.

Lawrence always strives to ensure that every event runs seamlessly, delivers a pleasurable experience, and leaves a lasting impact on all attendees.

"I am enthusiastic about spreading the word and building excitement for upcoming events. Witnessing the happiness of my colleagues at events has inspired me to strive for even better future events."

Thank you, Lawrence, for all you do for our team and credit union partners! 🍹

KeyStone Tips & Tricks:
Network Restrictions Best Practices

As fraud is always on the rise and an ever-evolving challenge, having the flexibility to mitigate and reduce fraud activity can save your credit union and your members money. One of the ways KeyStone provides you that flexibility is with the ability to define an unlimited number of real-time network restrictions to apply to card transactions coming through your debit, credit, or ATM card network at no additional cost.

This functionality was designed to enable your credit union to choose the conditions for blocking fraudulent card transactions and revise them as often as necessary. For example, you can choose to deny transactions originating from a specific geographic location including city, state, or country, specific dollar amounts, merchant name, merchant category, transaction source type, card acceptor location, and more.

There are times when you need to act fast, and KeyStone's network restrictions put the control in your credit union's hands to respond quickly without the need to go through your network processor. If a situation arises where there is an influx of fraudulent card transactions originating from one isolated source, KeyStone gives your credit union the control to set a restriction to prevent those transactions from processing. You can quickly enable and disable these restrictions and the change will take effect immediately.

When setting up network restrictions, you can perform tests prior to putting the restrictions into effect using the Network Restriction Analysis batch program. This allows you to perform "what-if" scenarios that analyze your Network Log records for a specified time range to determine which network transactions would be denied using the network restrictions that have been defined. Once you are satisfied with the results, you can change the status to put the restrictions into effect.

For more information, visit Confluence to learn how to set up the Network Restrictions table in KeyStone here and learn about the Network Restriction Analysis Batch Program here.* 🗑

Confluence access required

Upcoming Training & Seminars

For the full list of upcoming Corelation training offerings and to register for courses, click here. *(Confluence access required)*

Advanced Queues	**Disputes**	**Posting Exceptions**
July 28th	August 22nd	September 12th
12-1pm PST	12-1pm PST	12-1pm PST

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Beginner Jaspersoft Reports
(SQL Experience Required)
July 5-6 • August 29-30

Beginner Jaspersoft Reports
(with SQL Basics)
July 11-13 • August 1-3 • September 5-7

UI Scripting Training
July 18-20 • September 5-7

Advanced Jaspersoft Reports
July 25-27 • September 19-21

KeyBridge Training
August 9-10

KeyStone Server Administration
August 16-17 • September 27-28

Batch Scripting Training
August 22-24

Fundamentals of Agile & Scrum
August 23

What's Up KeyStone Developers User Group?

The KeyStone Developers User Group was established in late 2020 with the aim of creating a forum where software developers could convene and collaborate, exchange ideas, and share solutions.

Trevor T. Lerkins, Vice President Information Technology at Reliant Community Credit Union, was initially compelled to take action after witnessing a team member struggle to find a prompt solution to a challenge. With a desire to assist and connect developers together, he founded the KeyStone Devs User Group.

"Sometimes you just want a solution now, and a resource to engage quickly," said Trevor. "The most exciting aspect has been watching the dynamic back-and-forth conversations, where people utilize the distribution list to swiftly crowdsource ideas and receive prompt responses."

The group has grown to include more than 175 members since its inception, representing over 60 credit unions across 32 states. The leadership team has grown as well by adding Margaret Nieter of CommunityWide Federal Credit Union and Devin Carlson of Clearwater Federal Credit Union. Together, the group's collective areas of expertise include script and report writing, programming, as well as data visualization.

Virtual Meetings & Client Group Community Forum

The Developers User Group holds around five meetings per year, with an increased emphasis on demonstrations where members of all levels of experience are encouraged to showcase a development effort they are proud of. There are three more meetings scheduled for 2023, which will take place on July 25th, October 3rd, and December 12th at 1 PM Eastern Time. These upcoming meetings plan to cover a range of topics, including code sharing, report structures, data visualization, Jaspersoft dashboards, and batch and UI scripting.

Get Involved with the KeyStoneDevs User Group

Each credit union has its own unique processes, making it fascinating to observe how others approach various problems and topics. What sets this specific user group apart is its membership, consisting entirely of software developers and they always welcome other developers who are interested in joining. They eagerly welcome fresh perspectives and innovative ideas on an ongoing basis. Recordings are available of past meetings that include informative demonstrations and engaging discussions. If you're interested in becoming a part of this group, please don't hesitate to reach out. 🍺

Mayhem on the Midway!
200 Clients Signed

Preferred Partner Spotlight: Mahalo Banking
Long-Term Benefits of Deep Core Integration

For a full list of Corelation partners, click here.

Many credit unions today are experiencing pressure to update their banking technology to keep up with evolving digital transformation strategies – this could mean enhancing your mobile and online banking capabilities or automating back-end tasks.

Adding new technology can be challenging and so often depends on selecting vendors that work seamlessly with your core provider. Vendors that offer real-time core integrations create a smoother experience, ease operational processes, and simplify potential obstacles that may arise.

Through real-time integrations, delays in data processing are minimal and member information is up to date for easier access. Investing in vendor partnerships that prioritize this approach to integration is paramount to the success of implementation and enables your credit union to prevent


any digital service disruptions.

Choosing tech partners that can facilitate and spearhead the integration with your core system ultimately improves efficiency and strengthens customer relationships by streamlining regular system updates and ensuring reliable user experiences.

Mahalo Banking is deeply integrated with Corelation KeyStone's core software. Mahalo Banking works directly with Corelation and has created a unified experience to ensure that any future software updates are seamlessly integrated into their digital banking platform in real time. In addition, their data processing capabilities enable Corelation to serve as your primary database, which means your staff can eliminate scattered systems and easily keep up with all member interactions by simply logging into KeyStone. 🍺

Corelation Client News & Success

Penn East Federal Credit Union
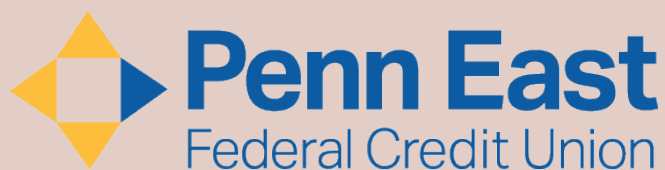
Jeff DeBree, the CEO of Penn East Federal Credit Union, has been honored as the 2023 William W. Pratt Professional of the Year by the CrossState Credit Union Association! Over the past 19 years, Jeff has exhibited exceptional leadership, driving the growth and progress of Penn East, increasing its membership base, and completing four mergers successfully. Additionally, he has made it a priority to encourage his staff's growth and development while also promoting education and community engagement. Congratulations, Jeff! Join us in sharing your congratulations here.

PALMETTO CITIZENS FEDERAL CREDIT UNION

The U.S. Department of Treasury has certified Palmetto Citizens Federal Credit Union as a Community Development Financial Institution (CDFI)! Established by Congress to merge federal funds with private investment, CDFIs are mission driven organizations focused on serving low-income and underserved communities. As a CDFI, Palmetto Citizens will have access to federal grants, bond programs, and tax credits they can use to invest in the Midlands region of South Carolina. Palmetto Citizens joins less than 1,400 financial providers nationwide, and just 20 in SC, to achieve this certification. Read more here.

Welcome, New Clients

(Through June 1, 2023)

IC Credit Union
$681 million in assets
Fitchburg, MA

Neches Federal Credit Union
$894 million in assets
Port Neches, TX

PremierOne Credit Union
$562 million in assets
San Jose, CA

Certified Federal Credit Union
$795 million in assets
El Monte, CA

US Community Credit Union
$299 million in assets
Nashville, TN

Knoxville TVA Employees Credit Union
$3.97 billion in assets
Knoxville, TN

Credit Union of Denver
$1.1 billion in assets
Lakewood, CO

Zing Credit Union
$448 million in assets
Denver, CO

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We'd like to recognize our partners who generously supported the 2023 Corelation Client Conference.
Thank you for your support!

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- Catalyst Corporate Credit Union

May 31st Lunch Sponsors:
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- Vulcan Datacorp

May 31st Afternoon Break Sponsors:
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- Digital Check

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- boost.ai
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- Corporate One FCU

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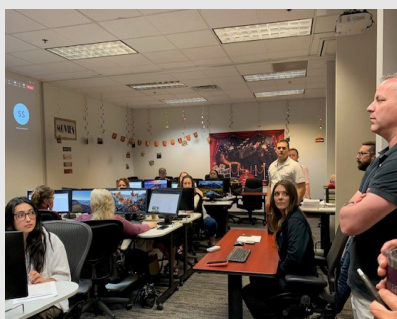- United Solutions Company
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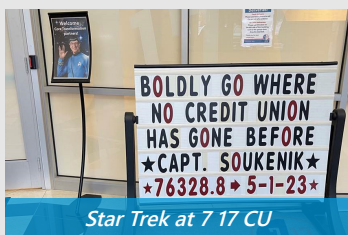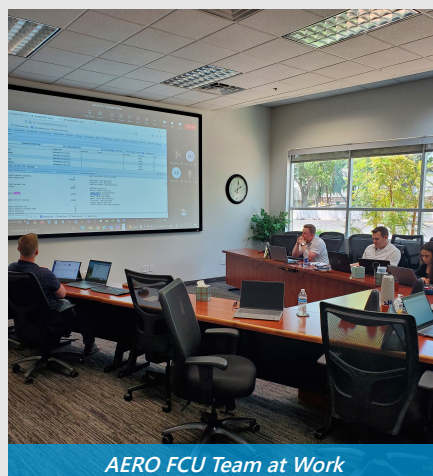- CUNA Mutual Group
- DaLand CUSO
- IMS, Inc.
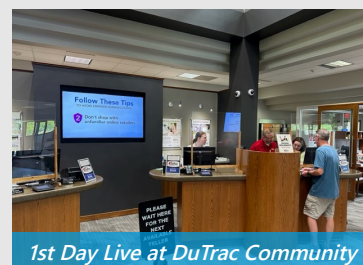- Mastercard

Conversiongram

AERO FCU Ready to Start Conversion

Star Trek at 7 17 CU

AERO FCU Team at Work

1st Day Live at DuTrac Community

Seflies With the REV FCU Team

Poses at Pathways Financial CU
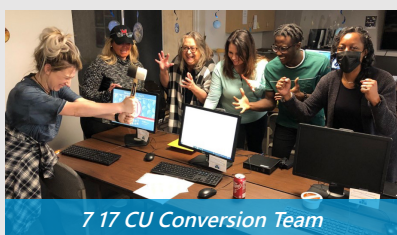

REV FCU

Smiles at 7 17 CU

7 17 CU Survives Conversion Weekend

DuTrac Community CU Conversion Cows

DuTrac Community

7 17 CU Conversion Team

DuTrac Community CU Farm Fun

Clownin' Around at 7 17 CU

REV FCU

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