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CONTACT:

Mike Lawson

michael@dmlcommunications.com

760.845.8146

KeyStone Community Confirms Monterey Credit Union's Decision to Select Corelation

SAN DIEGO - July 25, 2022: Before officially beginning their search for a new core in 2021, [Monterey Credit Union](#) (\$306 million in assets; 17,308 members; Monterey, CA) has spent the last eight years watching the industry and considering their options. After a thorough review of four core processors and connecting with a number of credit unions selecting KeyStone, Monterey Credit Union decided that [Corelation](#) was the right organization with which to partner.

“Attending Corelation’s Client Conference last year, we were struck by the feeling of community amongst Corelation, their vendor partners, and most importantly: their credit union clients,” remarked Monterey Credit Union Vice President Information Systems Scott Morris. “I had the chance to talk to the first credit union to convert to KeyStone - it speaks volumes that they are still with Corelation.”

From their earliest interactions with Corelation, Monterey Credit Union felt that the organization was responsive and genuinely interested in helping their clients. From the technology standpoint, KeyStone will provide the credit union with the foundation to develop new products and services for their members and offer quicker turnaround for integrating third-party products.

“After more than 30 years on an account-centric core, switching to KeyStone’s person-centric system will help us better understand and serve our members,” added Morris. “We’re also looking forward to having the ability to run our end-of-day and end-of-period processing “lights out” without a person actively monitoring it.”

Other factors that swayed Monterey Credit Union’s decision were the browser-based system that doesn’t require specific software to be maintained on each device, new membership application

workflows, and the turn-key high-availability disaster recovery (HADR).

“One of the biggest benefits of our annual Client Conference is the opportunity for our credit union partners to connect with each other, share best practices and ideas, and leave having added new friends to their network,” shared Corelation President Rob Landis. “Welcome to the Corelation community, Monterey Credit Union!”

About Corelation, Inc.

Based in San Diego, CA, Corelation is the innovative core processor for today’s credit union. This solution is a person-centric system that empowers credit unions to offer the best member service possible, enhancing their value for member attraction and retention. In terms of industry experience, Corelation’s staff has dedicated their careers to creating core systems and providing unparalleled client service. For more information, visit www.corelationinc.com.

About Monterey Credit Union

Founded in 1968 in Monterey California, Monterey Credit Union has grown to over \$300M in assets serving 20,000+ members with three full-service branches. Consumers who live or work in the counties of Monterey, San Benito, Santa Cruz, Santa Clara, or San Luis Obispo are eligible for membership.

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Monterey CU Vice President Information Systems Scott Morris