corelation keynotes™

Summer 2026 ~ Volume 17, Issue 2

Corelation Dreamin' Client Conference: Innovation Meets the California Coast

Corelation Dreamin', the 15th Annual Corelation Client Conference, brought together sunshine, shared ideas, and a strong sense of community from May 13–15 at the Manchester Grand Hyatt in San Diego. Drawing a record 1,269 in-person attendees that included credit union leaders, innovators, and vendor partners from across the country, Corelation Dreamin' blended KeyStone expertise with seaside-inspired fun, reinforcing Corelation's belief that the strongest ideas are built through relationships.

"The Corelation Client Conference offers content-rich general and breakout sessions that provide practical solutions for all credit unions, regardless of where they are in their journey," said Randy D. Thompson, Chief Information Officer of Neches Federal Credit Union. "It's a valuable opportunity to learn, collaborate, and connect with peers across the industry."

Thursday marked the official opening, with a full day of general sessions. Keynote speaker Brian Carter, CEO of The Brian Carter Group, challenged credit unions to rethink how they compete against fintechs and big banks, advising them to leverage their relationship-driven strengths in key moments. Cybersecurity expert Jim Stickley followed with real-world examples, demonstrating how easily systems can be compromised and how to stay ahead of evolving threats.

A highlight was the Coolness of Corelation, a client led session showcasing creative uses for KeyStone. From optimization to member focused enhancements, clients presented practical solutions for peers to bring back to their teams.

The Vendor Showcase and Vendor Speed Rounds provided opportunities to explore third-party solutions and tools that integrate with KeyStone. "The conference was fantastic—the steady traffic, collaborative Vendor Showcase setup, and the built-in networking time were all perfect," said Philip Canizaro, VP of Sales and Marketing for Sync1 Systems. "The attendee engagement, vendor promotion, and overall value created real momentum and made a lasting impression."

On Friday, guests chose from operational, technical, executive, and new client tracks, with sessions tailored to individual needs with sessions organized by role, experience level, and strategic priority. Topics ranged from bulk file maintenance and fraud preparedness to merger strategies, instant payments, conversational AI, and recovery readiness. Executive sessions focused on leadership, innovation mindsets, and strategic growth, while operational and technical tracks delivered practical training and best practices. New clients benefited from targeted conversion guidance designed to set them up for long-term success.

"Getting to meet Corelation employees, clients, and vendors was really informative, and everyone was very welcoming," shared a first-time attendee. "I left the new client sessions feeling confident that a conversion to KeyStone would be well managed and a strong partnership opportunity."

Throughout it all, KeyLab remained a hub of activity, where attendees collaborated one-on-one with KeyStone experts, explored workflows, and left with actionable takeaways tailored to their unique needs.

The week wrapped up with a closing reception at Belmont Park, San Diego's historic amusement park that offers classic boardwalk charm, ocean breezes, and fun. The 15th Annual Client Conference captured what makes the KeyStone community special, collaboration and a shared commitment to innovation.

CONTENTS

Note from the CEO

Dear Friends,

I am over the moon to report that 2026 continues to deliver on its promise as the best year ever at Corelation, and our second quarter has been filled to the brim with excitement. We've had three separate headline-worthy highlights since my last update, and I'm bursting with pride for the hard work and true passion of my fellow Corelatives that made each a reality:

- In April, we were honored and elated to be selected by State Employees Credit Union as their new core provider. Headquartered in Raleigh, North Carolina, SECU is the second-largest credit union in America by virtually any metric, representing ~$59B in assets, supporting ~3 million members, and offering 275 branches. This surpasses our own prior high-water mark as the largest signing in credit union core history.

- In May, we hosted the largest event in our history, as our 15th Annual Client Conference drew over 1,250 attendees to sunny San Diego. Our slate of engaging speakers covered a variety of relevant topics, and we harnessed the energetic participation of the user group community and over 108 vendors. Finishing things off with a carnival at historic Belmont Park was the icing on the cake for this incredible event.

- And on June 1, we completed the single largest core conversion in credit union history as Mountain America CU migrated 1.4 million members and $22.6B assets onto KeyStone. I had the privilege of attending in person and seeing firsthand the trust and teamwork forged over years of collaboration, all culminating in a smooth transformation weekend and some well-deserved congratulatory toasts.

I am humbled to lead such a vibrant organization and to share the team's accomplishments with all of you. To paraphrase Dr. Seuss, "And will we succeed? Yes! We will indeed! (98 and ¾ percent guaranteed.) KID, WE'LL MOVE MOUNTAINS!"

Sincerely,
Rob Landis, CEO, Corelation Inc.

Employee Spotlight: Bill Hopkins, Business Development Executive

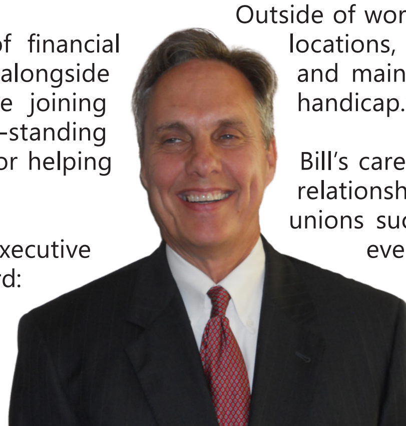
Bill Hopkins has built a long and impactful career in credit unions and financial technology, shaped by strong relationships, industry expertise, and a deep understanding of operations.

Raised in Sharon, Pennsylvania – part of the "steel valley" of western PA – Bill grew up alongside his identical twin brother in what he describes as a hardworking, close-knit community that helped shape his outlook from an early age. He later attended St. Vincent College in Latrobe, PA, where he received a liberal arts education rooted in strong regional tradition.

Bill began his career as a teller in Washington, DC, after spending earlier years working a variety of jobs, from waiting tables to moving furniture and digging ditches. The role quickly became a hands-on education in every corner of credit union operations and sparked his appreciation for the impact software can have on financial institutions and their members.

That experience led Bill into the space of financial technology, where he spent 20 years working alongside industry leaders in core processing before joining Corelation. His career has been built on long-standing partnerships, shared vision, and a passion for helping credit unions evolve through innovation.

Today, Bill serves as a Business Development Executive at Corelation and describes his role in one word: "fun." He enjoys the variety each opportunity brings and helping organizations find the right solutions for their goals.



One of Bill's proudest accomplishments was securing Corelation's partnership with State Employees' Credit Union (SECU), the second largest credit union in the country, in what became the largest core system engagement in industry history. The multi-year effort stands as both a personal milestone and a significant achievement for the company. Reflecting on the experience, Bill describes it as "a remarkable capstone to my wonderful career and a marquee accomplishment for our company."

For Bill, the most rewarding part of the job is the people. He values working alongside longtime colleagues and enjoys reconnecting with clients after conversion to hear firsthand how KeyStone has positively impacted their day-to-day operations. He describes Corelation's culture as one centered on excellence, collaboration, and dependability.

Outside of work, Bill stays busy managing homes in multiple locations, keeping up with family across the country, and maintaining what he calls his "best plausible golf handicap."

Bill's career reflects decades of experience, meaningful relationships, and a continued passion for helping credit unions succeed through technology. We're grateful for everything Bill has contributed to Corelation over the years and for the expertise, leadership, and dedication he continues to bring to our team and clients every day!

Advancing Digital Asset Capabilities Through Coin2Core Integration

As digital assets continue to gain traction, credit unions are evaluating how to stay connected to evolving member expectations while maintaining the trusted relationships at the core of their mission. Through Corelation's collaboration with DaLand CUSO and its Coin2Core® solution, KeyStone clients now have a new pathway to explore digital asset capabilities integrated directly within their existing ecosystem.

For many financial institutions, the conversation around crypto and digital assets has often centered on volatility and regulation. While those considerations remain important, another challenge is emerging: maintaining visibility into where members are storing and moving value. As financial activity expands beyond traditional accounts and into external platforms, these institutions risk losing opportunities to engage members and remain at the center of their evolving financial journey.

At the same time, members increasingly expect seamless digital experiences from the institutions they trust most. Credit unions are uniquely positioned to provide that experience, combining innovation with the personalized service and guidance members value. The key is finding an approach that allows organizations to evolve without introducing unnecessary complexity or disrupting existing operations.

Rather than approaching digital assets as a disconnected add-on or third-party experience, the Coin2Core integration focuses on infrastructure. By integrating digital asset capabilities directly with the KeyStone core, credit unions can pursue new opportunities while maintaining control of the member relationship, data, and user experience.

This approach is designed to help organizations move forward intentionally and at a pace that aligns with their individual strategy. Instead of requiring institutions to step outside of the systems and processes they already trust, Coin2Core extends KeyStone's capabilities into an emerging area of financial services while supporting existing compliance and operational frameworks.

Digital assets continue to evolve, and member expectations will evolve alongside them. The industry may not have every answer today, but having a thoughtful path forward matters. Through the Coin2Core integration, Corelation clients have an avenue to explore what's next while continuing to deliver the trusted, member-focused experience that has always set them apart.

For more information on Corelation's collaboration with DaLand and the Coin2Core integration, visit dalandcuso.com/coin-2-core.

COIN-2-CORE

Upcoming Training & Seminars *sponsored by* Unit21.ai

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

KeyStone LOS
July 23rd
12-1:30pm PST

KeyInsight with Cross-Sell
August 20th
12-1:30pm PST

Ad Hoc - Advanced Reporting
September 9th
12-1pm PST

Back-Office Technical Training

KeyBridge Training
August 25-26

Beginner Reports Training
July 7-9 • August 11-13 • September 8-10

Advanced Reports Training
July 28-30

UI Scripting Training
August 18 -20

Batch Scripting Training
July 14-16 • September 20 - October 1

KeyStone Server Administration
August 4-5

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Corelation Client News

Corelation Clients Recognized in Credit Union House Hall of Leaders

Several Corelation clients were honored at the Governmental Affairs Conference 2026 with induction into the Credit Union House Hall of Leaders. This recognition highlights individuals who have made a lasting impact on the credit union movement through leadership, advocacy, and service.

Congratulations to Jackie Buchanan of Genisys Credit Union, Fred Milton of Red River Credit Union, Timothy O'Donnell of Financial Plus Credit Union, and Frank Weidner of Wings Credit Union! Their contributions continue to strengthen the industry and inspire progress across the credit union community.

Read more about the awards.

KeyBridge Certified

New KeyBridge Certified Vendors

(Through June 5, 2026)

ToolCASE

Upstart

Diebold Nixdorf

InvestiFi

Preferred Partner Spotlight: Hawk

The Shift from Reactive to Real-Time Financial Crime Prevention

by Bryan Smythe, SVP Sales, Hawk • For a full list of Corelation partners, click here.

Credit unions are facing a rapidly evolving financial crime landscape. Fraud scams are becoming more sophisticated, payment speeds continue to accelerate, and members expect fast, seamless experiences across every channel.

At the same time, many financial institutions still rely on systems designed for a different era: identifying suspicious activity after the fact and requiring compliance teams to work through large volumes of alerts and manual reviews.

As payments move faster and fraudsters become more organized, reacting to financial crime after money has left an account is increasingly difficult and costly. Credit unions are looking for ways to identify risk earlier, respond faster, and focus resources on the activity that matters most.

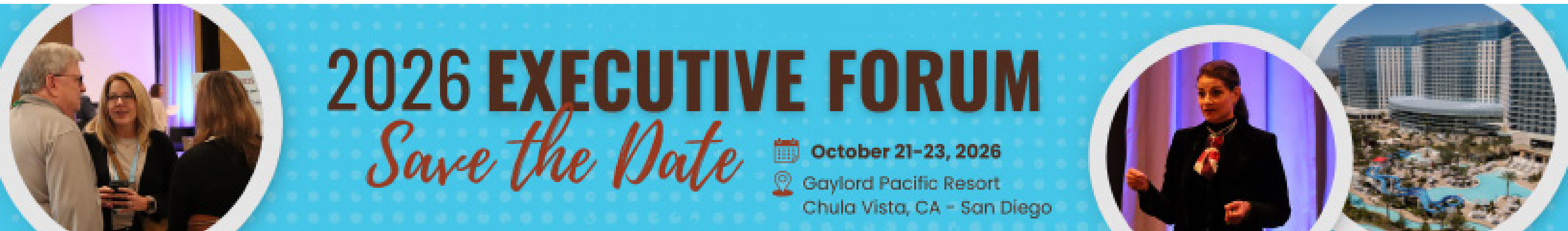
This is driving a shift toward real-time financial crime prevention.

Hawk helps credit unions modernize AML (anti-money laundering), fraud prevention, and customer screening through a unified platform designed to detect risk as it emerges. By analyzing customer behavior and transaction activity in real time, Hawk helps institutions identify suspicious activity sooner, prioritize higher-risk alerts, and reduce unnecessary investigative workload.

Rather than forcing teams to choose between stronger controls and a better member experience, Hawk enables credit unions to make faster, more informed decisions while maintaining transparency and regulatory confidence.

As financial crime continues to evolve, real-time detection is becoming a critical capability for institutions seeking to protect members, improve operational efficiency, and stay ahead of emerging threats.

To learn more about Hawk's real-time financial crime prevention platform, visit hawk.ai.



The Southeast User Group Looks Ahead

Collaboration has long been a cornerstone of the Corelation client community, and the Corelation Southeast User Group (SEUG) was created to support that spirit among credit unions using the KeyStone core. SEUG is preparing to re-engage the region, rebuilding momentum, and inviting new participants to help shape the group's future.

SEUG brings together credit unions from across the Southeast to exchange ideas, share best practices, and learn how peers are using KeyStone for everyday challenges. While all members rely on the same core system, each credit union may have their own unique methods and processes. The group provides a space to explore different problem-solving approaches and gain insight into new workflows.

To support this next chapter, SEUG has reestablished its Board. Once the board assignments are finalized and officers are ratified, SEUG will resume regular meetings, both virtually and in person. In the past, the group has hosted social gatherings, educational webinars, and discussions on topics such as batch scripting, business intelligence reporting, card solutions, and cybersecurity trends.

User groups also provide access to online discussion forums, where members can ask questions, explore solutions, and learn from other KeyStone credit unions across functional areas. New and fresh perspectives are always welcome, and SEUG looks forward to reconnecting the community and strengthening collaboration across the region. If you're interested in joining the SEUG, please email RobertLong@Alabamaone.org or John.Salgado@dugood.org. For more information on the regional, client-led KeyStone User Groups, click here.*

*Confluence access required

Welcome, New Clients

(Through June 10, 2026)

RTP Federal Credit Union
$145 million in assets
Research Triangle Park, NC

MEMBERS1st Community Credit Union
$291 million in assets
Marshalltown, IA

Greater Woodlawn Federal Credit Union
$166 million in assets
Blasdell, NY

State Employees' Credit Union
$59 billion in assets
Raleigh, NC

Indiana State University Federal Credit Union
$138 million in assets
Terre Haute, IN

Campus Federal Credit Union
$938 million in assets
Baton Rouge, LA

Compass Credit Union
$105 million in assets
Sparta, MI

SunWest Federal Credit Union
$530 million in assets
Glendale, AZ

Alabama Credit Union
$2 billion in assets
Tuscaloosa, AL

The District Fedeal Credit Union
$151 million in assets
Aurora, CO

Thank You, Conference Sponsors

We'd like to recognize our partners who generously supported the 2026 Corelation Client Conference.
Thank you for your support!

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Conversiongram

White Sands Federal Credit Union!

The Gang at Meritus FCU!

The Force is Strong at Great Erie Federal Crdit Union!

All Smiles at Police FCU

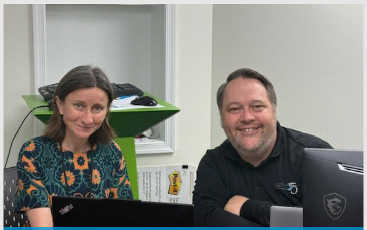
ServU FCU Conversion Success!

Meritus FCU Teamwork!

TruWest Credit Union Team!

Police Federal Credit Union Stops for a Pic

Leveling Up at White Sands FCU!



Great Erie FCU Working Hard!

TruWest Credit Union Group Pic

The Fur Babies at Meritus FCU!

Building a Strong Core at ServU FCU!

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