

2018 ANNUAL REPORT



CEO'S REPORT, DAVE ADAMS



2018 opened and closed with strong results for CU Solutions Group. Several strategic decisions allowed collaboration with new partners to grow and advance our products and services.

Successes across all four of our divisions — including the newest division, Strategic Advisory Solutions — have improved our position in the credit union space as thought leaders and innovative service providers. CU Solutions Group's operating income grew by 12.5% through 2018, but the negative performance of the stock market impacted CUSG's equity holdings. As a result, pre-tax income was off slightly at \$6.5 million. But the good news is after-tax net income was strong at \$4.9 million.

Now through the first quarter of 2019, our balance sheet remains strong with assets totaling \$86 million, including cash and marketable securities of \$53 million. Shareholders' equity totaled \$73 million, which is an increase of 6.2% for the quarter.

Turning attention to operations, our mobile banking+ application, LifeSteps® Wallet, had an eventful first year. Early adopter credit unions helped us implement updates and spread the word about this unique mobile technology. To enable new, outside investment opportunities in 2019, a new subsidiary, LifeStep Solutions, LLC, was created. The new team will focus on product strategies that improve credit union members' mobile experience, enable neobanking strategies and deliver mobile tools that will help credit unions serve the underserved. Another technology product that has received positive feedback is our ADA compliance solution. More than 100 clients signed up to work with us and our exclusive partner, AudioEye.

The Love My Credit Union® Rewards (LMCUR) Sprint® Cash Rewards program surpassed several big milestones in 2018 with total registered lines exceeding 1.5 million. Moving into 2019 with LMCUR, the focus

will be on a full omnichannel reinvention of the LMCUR platform, including intelligent marketing, user experience simplification and further integration with LifeSteps Wallet. Other marketing products that have grown significantly are Save to Win® and GSTV. Save to Win broadened its national footprint to 14 states and more than 120 credit unions, and GSTV grew media placement income by nearly 20% year-over-year by attracting larger credit union contracts.

For our HR platforms Performance Pro® and Compease, we've concentrated on product reinvention, sales and marketing performance. A Michigan-focused launch of Planning Pro™ in late 2018 was preceded by a successful pre-launch sales period. 2019 will see the national launch of Planning Pro and Governease, as well as the launch of TLC 360, a credit union-focused learning management resource that streamlines professional development.

Finally, Strategic Advisory Solutions has collaborated with credit unions to drive change in the areas of leadership, strategy and risk since its launch in mid-2018. More than 100 touchpoints were made in the areas of strategic planning, risk management and leadership development. Successes also included the acquisition of an ownership stake of credit union sector rights to AffirmX's patented risk management tools and services.

Moving into 2019, our key priorities and goals include:

- Enhancing and growing the Sprint®, TurboTax® and LifeSteps Wallet programs.
- Reinventing and strengthening all core solutions with greater focus on credit union priorities.
- Implementing a new subsidiary structure and improving our partnership with CUNA Strategic Services and credit union league service corporations.
- Improving capital investment strategies and execution while streamlining expenditures.
- Creating stronger alignment between strategic priorities and operational execution while rewarding staff more effectively for positive contributions.

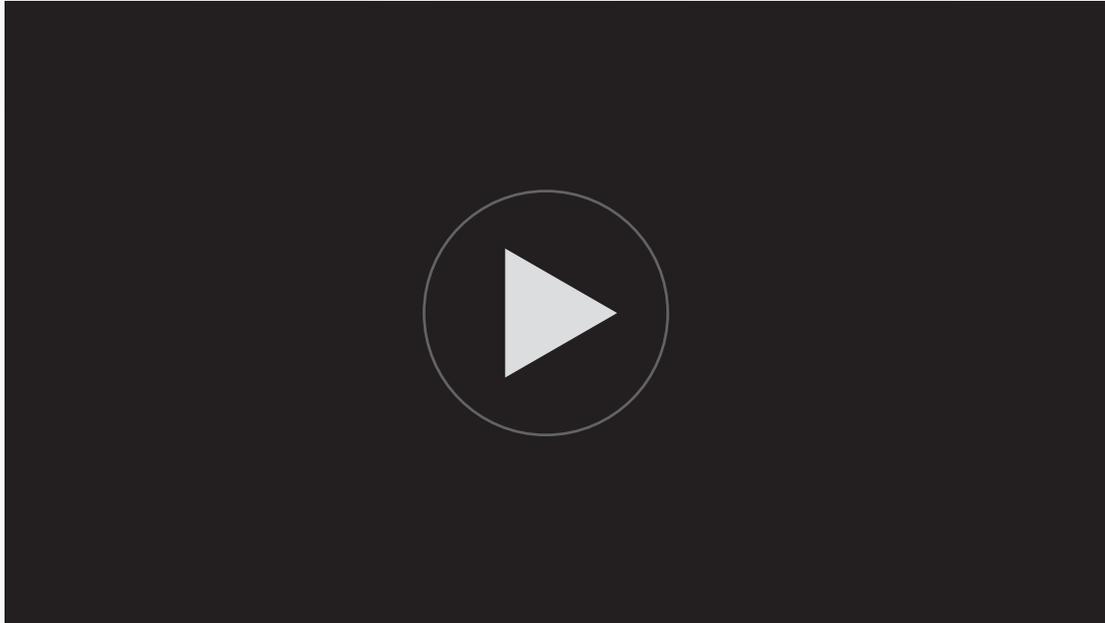
CUSG is prepared to make even greater strides in 2019 because of our passionate board of directors, dedicated employees and growing network of corporate partners. There can be no doubt the year ahead will bring bigger accomplishments and positive results.

Best regards,



Dave Adams
President/CEO, CU Solutions Group

Q1 2019 SHAREHOLDERS UPDATE



“*Your attitude determines your altitude.*”

— Stephen R. Covey, *“The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change”*

FAST FACTS **2018**

3,400+

Credit Union
Clients

90%+

Valued Employee
Retention

90%+

Employee
Satisfaction

20%

Performance Solutions
Annual Revenue Growth

11%

Technology Solutions
Annual Revenue Growth

5%

Marketing Solutions
Annual Revenue Growth

\$68.5M

Equity
Balance

CHAIRMAN'S REPORT, PETE DZURIS



CU Solutions Group has had a successful year aligning our service offerings with the strategic needs of credit unions, enabling them to serve, grow, and remain strong. Even as we adjust our goals and strategies, this mission remains our guiding “why” behind decisions.

CUSG applied those guideposts across five operational planning themes to great success.

Following the guidelines set forth in our strategic plan in 2018, we set our sights on expanding the Sprint Credit Union Member Cash Rewards program to include more participating credit unions and to improve members' program experience. By the end of the year, the number of new credit union member lines had grown by more than 65%. Part of this increase was due to an astute business case for an improved member offer made by CUSG to Sprint executives.

Similar insightful thinking has advanced several CUSG core solutions. Our partnership with AudioEye positioned CUSG to offer ADA web compliance services when this is a top concern for credit unions. Our performance management software continued to add value to clients through in-demand enhancements and cross-platform integrations. And of course, our core solutions grew through the addition of the Strategic Advisory Solutions division. The division's governance and leadership expertise is helping credit unions realize the importance of vision, results, process, and people within their own organizations.

Developing more and better mutually beneficial partnerships also served as a top planning theme throughout the year. These relationships have bolstered our technology and marketing offerings with exclusive agreements and expanded market reach.

For example, work with CULedger will provide an innovative, unique solution that allows members to confidently protect themselves from financial fraud and identity theft; work with AffirmX will help strengthen and expand compliance solutions for credit unions nationwide; and our new partnership with QCash Financial will help credit unions provide short-term, small-dollar mobile loans to members in need. CUSG's sales and marketing results have likewise improved through a deeper knowledge of meeting clients' and their customers' expectations.

Into 2019, the board's strategic plan refresh aims to drive higher returns for both employees and shareholders. We will continue to draw out the "why" behind decisions, especially as we embrace the new subsidiary structuring model, which will allow for strategic investors in new and current products. Optimizing distribution networks and partnerships will also serve to advance our mission and deliver value.

I am excited by our prospects for the coming year. With a plan in place for continued advancement, the outlook for 2019 is bright. Thank you to CUSG's

leaders and employees for their guidance and hard work as we confidently move forward with our mission and new company goals.

Many thanks,

A handwritten signature in black ink, appearing to read "Pete P. Dzuris". The signature is fluid and cursive, with a large initial "P" and "D".

Pete P. Dzuris
Chairman of the Board, CU Solutions Group

TREASURER'S REPORT, DAVID SNODGRASS



I'm pleased to report that CU Solutions Group posted a strong and profitable performance for 2018. A net income of \$4.9 million in 2018 led to a dividend payout of \$2.4 million to shareholders, which was the company's eighth consecutive year for paying dividends.

Additional year-end highlights include:

- 2018 revenue totaled \$44 million, \$1.1 million over 2017.
- Total shareholder equity grew to \$69 million, or \$6,089 per share.
- Assets totaled \$85 million and included \$53 million in cash and marketable securities.
- CU Solutions Group paid more than \$6 million to leagues and credit unions for Love My Credit Union Rewards sales and marketing efforts.
- The Tax Cuts and Jobs Act of 2017 decreased the federal tax rate in 2018, which saved the company nearly \$1 million in taxes during the year.

As we transition into 2019, executive management continues to build a resilient balance sheet, and CU Solutions Group is well positioned for the year ahead.

Respectfully,

A handwritten signature in black ink that reads "David Snodgrass". The signature is fluid and cursive, with a long horizontal stroke at the end.

David Snodgrass
Secretary/Treasurer, CU Solutions Group

INCOME STATEMENT SUMMARY

	Year Ended December 31	
	2018	2017
Revenue	\$ 44,007,391	\$ 42,920,563
Cost of sales and services	12,720,652	14,449,808
GROSS PROFIT	\$ 31,286,739	\$ 28,470,755
Operating expenses	26,897,353	24,528,004
NET OPERATING INCOME	\$ 4,389,386	\$ 3,942,751
Other income, net	2,097,050	5,309,829
INCOME BEFORE INCOME TAXES	\$ 6,486,436	\$ 9,252,580
Income taxes	1,590,568	1,867,755
NET INCOME	\$ 4,895,868	\$ 7,384,825
Other Comprehensive Income	(2,280,882)	1,868,830
COMPREHENSIVE INCOME	\$ 2,614,986	\$ 9,253,655

ELECTION OF DIRECTORS

FOUR CU SOLUTIONS GROUP DIRECTORS ARE UP FOR ELECTION IN 2019:



JOHN BUCKLEY

President/CEO
Gerber FCU



GARY MOODY

President/CEO
Credit Union One



MARK SHOBE

President/CEO
DFCU Financial



DEAN TRUDEAU

President/CEO
Public Service CU

ELECTION
OF DIRECTORS

Out of the four directors up for re-election, Dean Trudeau, Gary Moody, John Buckley and Mark Shobe all expressed interest in seeking re-election.

Self-nominating forms were sent to CU Solutions Group shareholders with a return due date of May 16, 2019. Dean Trudeau, Gary Moody, John Buckley and Mark Shobe submitted self-nomination forms.

Since enough individuals had self-nominated for the four open director positions, the chairman, using the proxies that he holds, nominates the following individuals:

John Buckley, President/CEO, Gerber FCU

Gary Moody, President/CEO, Credit Union One

Mark Shobe, President/CEO, DFCU Financial CU

Dean Trudeau, President/CEO, Public Service CU

CU SOLUTIONS GROUP COMPANY PROFILE

MISSION

At CU Solutions Group, we help credit unions serve, grow and remain strong so that together we can make an impact on people's lives.

OWNERSHIP

Some 130 investors, comprised of the Michigan Credit Union League, individual credit unions, credit union leagues and credit union service organizations, including CUNA Mutual Group, CO-OP Financial Services and others

CUSTOMERS

More than 3,400 credit unions, in addition to the public sector, small- and medium-sized businesses, universities and schools, hospitals and other vertical markets

KEY PARTNERS

Sprint, Intuit TurboTax, CUNA Mutual Group, GSTV, CO-OP Financial Services, Credit Union Vendor Management, CUNA Strategic Services, Autobooks, CULedger, QCash Financial, AffirmX, AudioEye, Access Softek and DP+, in addition to marketing partnerships with credit union trade associations and league service corporations spanning 48 states

KEY PRODUCT BRANDS

LifeSteps Wallet, Love My Credit Union Rewards, Performance Pro, Compease, Planning Pro, CUBE TV® Studios, Save to Win, Governease, and CUSG Executive Search powered by Angott™

OWNERSHIP STRUCTURE

64%

Michigan Credit Union
League & Affiliates



31%

National and Michigan
Credit Unions



5%

Credit Union Leagues
and System Partners



FOUR GUIDING PRINCIPLES

THESE FOUR PRINCIPLES GUIDE OUR PLANNING AND COMPANY CULTURE

VISION

Convey a compelling
and purposeful vision

RESULTS

Deliver value to owners,
customers, employees
and partners

PROCESS

Maintain efficient
and effective processes

PEOPLE

Continuously rehumanize
our culture

**CU SOLUTIONS
GROUP
LEADERSHIP**

EXECUTIVE MANAGEMENT



DAVE ADAMS
President/CEO



DREW EGAN
Special Advisor
to the President

“Great companies don’t hire skilled people and motivate them, they hire already motivated people and inspire them.”

— Simon Sinek, *“Start With Why: How Great Leaders Inspire Everyone to Take Action”*

SENIOR MANAGEMENT



AARON ADAMS
COO
Performance Solutions



TIM BOHLMAN
COO
Technology Solutions



DAVID DEAN
COO
Marketing Solutions



LISA RIZK
Chief Revenue
Officer and COO,
Michigan Credit
Union League
Service Corporation



BRANDI STANKOVIC
Chief Strategy Officer
and COO, Advisory
Solutions



MIKE WALLACE
COO
LifeStep Solutions



WENDY VADNAIS
Chief Financial
Officer

BOARD OFFICERS

CU SOLUTIONS GROUP 2018-2019 BOARD OF DIRECTORS



PETE DZURIS

Chairman
President/CEO,
Northland Area FCU



JACKIE BUCHANAN

Vice Chairman
President/CEO,
Genisys CU



DAVID SNODGRASS

Secretary/Treasurer
President/CEO,
Lake Trust CU

BOARD MEMBERS



JOHN BUCKLEY
President/CEO
Gerber FCU



KAREN CHURCH
CEO
ELGA CU



ERIC GELLY
President
CUNA Strategic
Services, Inc.



BILL LAWTON
President/CEO
Community
Financial CU



SCOTT McFARLAND
President/CEO
Honor CU



GARY MOODY
President/CEO
Credit Union One



MARK SHOBE
President/CEO
DFCU Financial



DEAN TRUDEAU
President/CEO
Public Service CU



**ANNETTE
ZIMMERMAN**
President/CEO
PrimeWay FCU

2019 TOP FIVE PRIORITIES

- 1** | Enhance and grow the Sprint, TurboTax and LifeSteps Wallet programs.
- 2** | Reinvent and improve all core solutions with greater focus on credit union priorities.
- 3** | Implement the new subsidiary structure and improve CUNA Strategic Services and LSC partnering.
- 4** | Improve our capital investment strategies and execution and streamline expenses.
- 5** | Create a stronger alignment between strategic priorities and operational plans and activities. Reward staff more effectively for their contributions!

PROVIDING SOLUTIONS FOR EXCELLENCE

Credit unions play a vital role in helping people land and stay on solid financial ground. At CU Solutions Group, everything we do is centered around helping credit unions serve, grow and remain strong so that they can make an impact on people's lives. To help fulfill that mission, CU Solutions Group provides credit unions with four separate areas of expertise: technology, marketing, performance and strategy.

› **RETHINK TECHNOLOGY**

Offering technology solutions that make it easy for consumers to connect with credit unions

› **REIMAGINE MARKETING**

Offering marketing solutions that produce awareness, grow membership and generate income

› **REINVENT PERFORMANCE**

Offering performance solutions that drive employee engagement and productivity

› **RECHARGE STRATEGY**

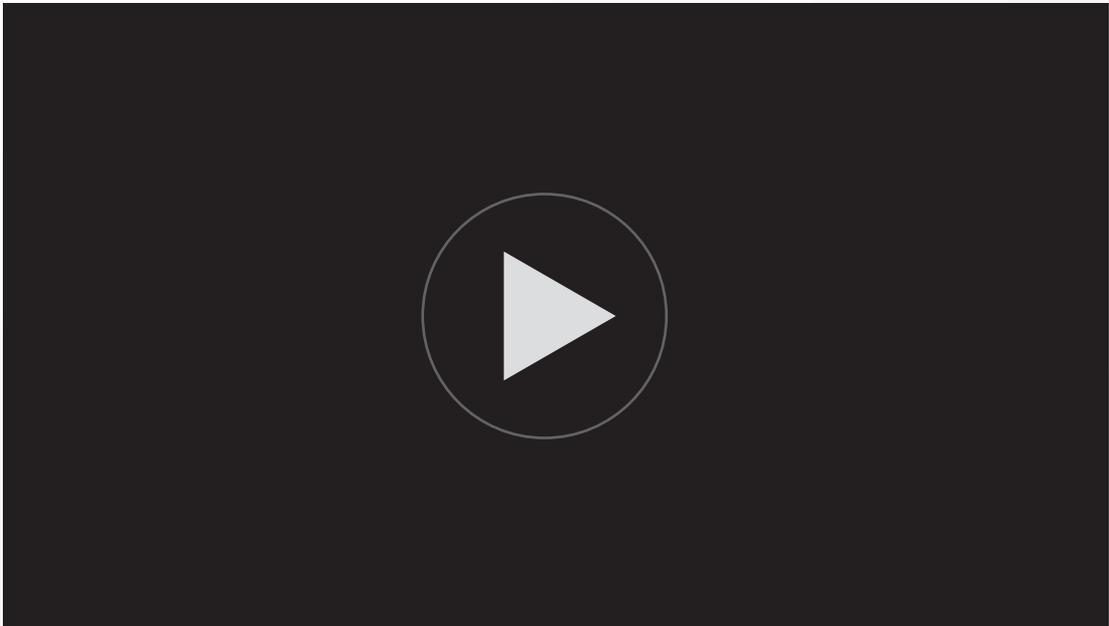
Offering strategic solutions that transform potential and accelerate business growth



OFFERING INNOVATIVE SOLUTIONS THAT MAKE IT EASY FOR MEMBERS TO CONNECT WITH CREDIT UNIONS

A credit union's website and mobile application are its most visible means of communication. Sites and apps are how members discover, research and interact with credit unions. Outdated resources, unattractive layouts and unreliable applications paint a poor picture for any organization but are nonstarters for trusted financial institutions.

Credit unions need high-quality, adaptive and customizable solutions to meet their specific needs — solutions that maximize capabilities and modernize operations. That's why Technology Solutions collaborates with credit unions to help them break through the boundaries of complacency and reach their full potential. We transform credit unions' online resources so they're lean, highly productive member-engagement tools capable of delivering end-to-end solutions.





WEB DESIGN & HOSTING

A trusted leader in secure web design and hosting for more than 20 years, Technology Solutions offers both turnkey, template-based websites and custom-designed websites that include clean and modern aesthetics, intuitive navigation and pathways designed to lead users to key products and services.



ADA COMPLIANCE

Technology Solutions helps credit unions comply with ADA standards and regulations by ensuring their websites provide equal access to online content. With key partner AudioEye, CUSG's ADA compliance solutions solve issues of accessibility and enhance the website user experience for all members.



LIFESTEPS WALLET

The LifeSteps Wallet mobile banking+ application is packed with powerful financial technology. From financial services to shopping, homebuying, travel, identity protection and more, this comprehensive mobile experience keeps your credit union top of mind and top of wallet when it matters most.



SCALABLE MOBILE APP SOLUTIONS

Scalable Mobile App solutions help you deliver all the mobile functionality banking customers expect while allowing you to customize the app to your credit union's unique needs — and they fit into your operating budget, which makes them look good to everyone.

TECHNOLOGY SOLUTIONS



TECHNOLOGY SOLUTIONS: WHAT'S NEW

LIFESTEP SOLUTIONS, LLC

A new opportunity for credit unions to capitalize on the neobank phenomenon

The convergence of tough economic times, waning trust in banks and the rapid advancement of mobile technology has given life to a fintech explosion in the areas of reloadable prepaid debit cards, digital-only checking and savings accounts, personal financial management tools, fractional share investment providers and fast, easy, short-term small-balance loans.

This emergence of neobank and challenger bank competitors provides credit unions with an opportunity to develop a new era of products and services. Built as a hub for strategic technology investors and collaborators, LifeStep Solutions, LLC is focused on developing new and innovative product strategies that will improve credit union members' mobile experience through modern and imaginative banking services.

TECHNOLOGY SOLUTIONS: WHAT'S NEW

CULEDGER'S MYCUID

Enhancing trust between credit unions and their members through secure technology

A valuable new partner to CU Solutions Group, CULedger provides advantages to credit unions and their members by reducing risks associated with cybersecurity and fraud, improving member experience, streamlining internal processes and reducing operational costs.

CULedger's MyCUID is the first global digital identity ecosystem for credit unions and their members. With MyCUID, credit union members can keep their accounts safe from fraud and identity theft in a way that is simple, fast and multifactor secure. Credit unions also benefit with increased member satisfaction, reduced need for support and deeper engagement with their members.

MyCUID works with a distributed ledger that was built for identity. It uses a person-to-person network of distributed, private agents to give credit union members a lifetime, portable digital identity that does not rely on a central authority.



TECHNOLOGY SOLUTIONS

TECHNOLOGY SOLUTIONS



TECHNOLOGY SOLUTIONS: WHAT'S NEW

NESTREADY

An end-to-end homebuying experience made possible by your credit union

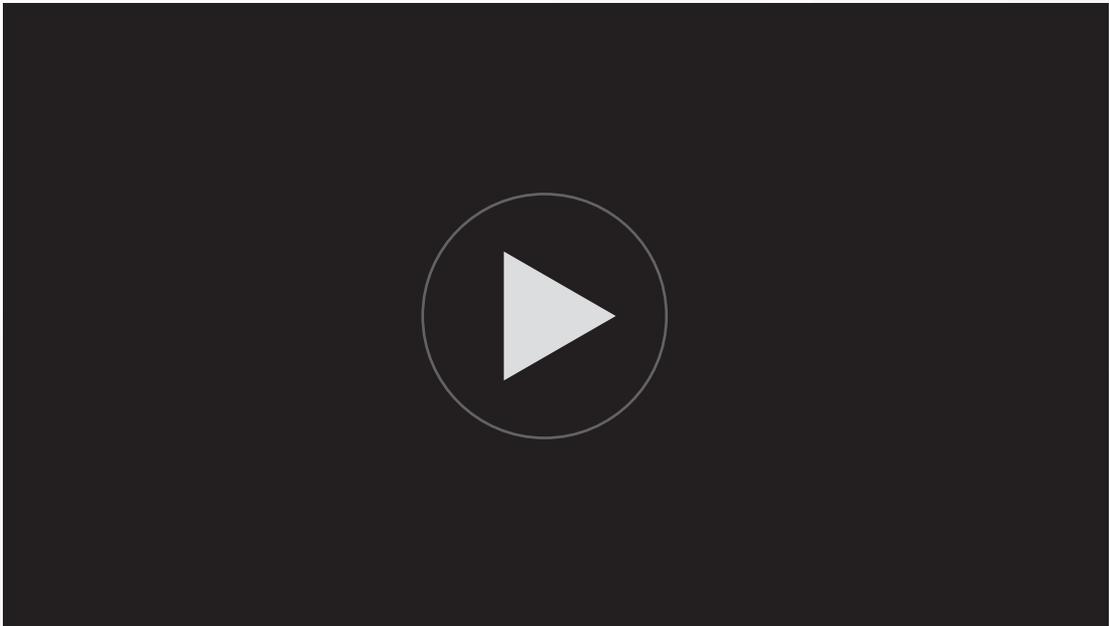
A reseller agreement with real estate tech company NestReady gives CUSG exclusive rights to digital homebuying experience solutions, allowing for expanded and enhanced delivery to credit unions.

Benefits, such as earlier relationship-building with homebuyers, detailed member insights, better targeting, higher conversions and substantial savings on mortgage brokers' referral fees, are integrated into your credit union's branded and customized mortgage lending process. NestReady's experience management solutions allow credit unions to better serve their members during such a pivotal life decision.

OFFERING MARKETING SOLUTIONS THAT GROW BRAND AWARENESS, MEMBERSHIP AND WALLET SHARE

Done right, marketing can create, sustain or shift a market in a credit union's favor — but it's not a simple task. Crafting communications that compel consumers into action takes years of strategic expertise, industry-specific insight and a firm grasp of modern marketing tactics.

With a proven history of generating credit union success, Marketing Solutions delivers the planning, support and execution of a full-service agency, focused on the unique needs and strengths of credit unions. Leveraging membership enhancement programs, organic and programmatic advertising, creative development and omnichannel delivery, the true value of the credit union difference is always the focus of CUSG marketing products and services.





LOVE MY CREDIT UNION REWARDS

By providing credit union members with exclusive offers for national brands, such as Sprint and Intuit TurboTax, Love My Credit Union Rewards saves members hundreds of dollars per year. With those savings now adding up to more than \$2 billion, the program stands alone in the credit union space.

SAVE TO WIN

Hundreds of credit unions are incentivizing smart savings while attracting new members with the nation's largest prize-linked savings program, Save to Win. Every time members deposit \$25 into their Save to Win savings account, they're entered into monthly and quarterly cash prize drawings.

GSTV

GSTV gives credit unions access to an audience that's captive, watching and near their branches — at the gas pump. Credit unions can localize media buys to the gas station next door or create a campaign to advertise across the state.



PROFESSIONAL MEDIA & CREATIVE SERVICES

Credit unions thrive with a holistic approach to marketing and advertising that includes clearly focused strategies, relevant messaging, compelling creative and an optimized media mix. That's why Marketing Solutions offers credit unions agency-level strategic, creative and media services at affordable prices.

CUBE TV STUDIOS

A high-quality video speaks volumes and is more impactful than simple words on a page — it gives life to the message. CUBE TV® can increase credit union visibility online and on broadcast television with engaging videos that capture member attention.



MARKETING SOLUTIONS



MARKETING SOLUTIONS: WHAT'S NEW

LOVE MY CREDIT UNION REWARDS REINVENTION

Rewarding credit union members with savings on top-shelf, everyday brands

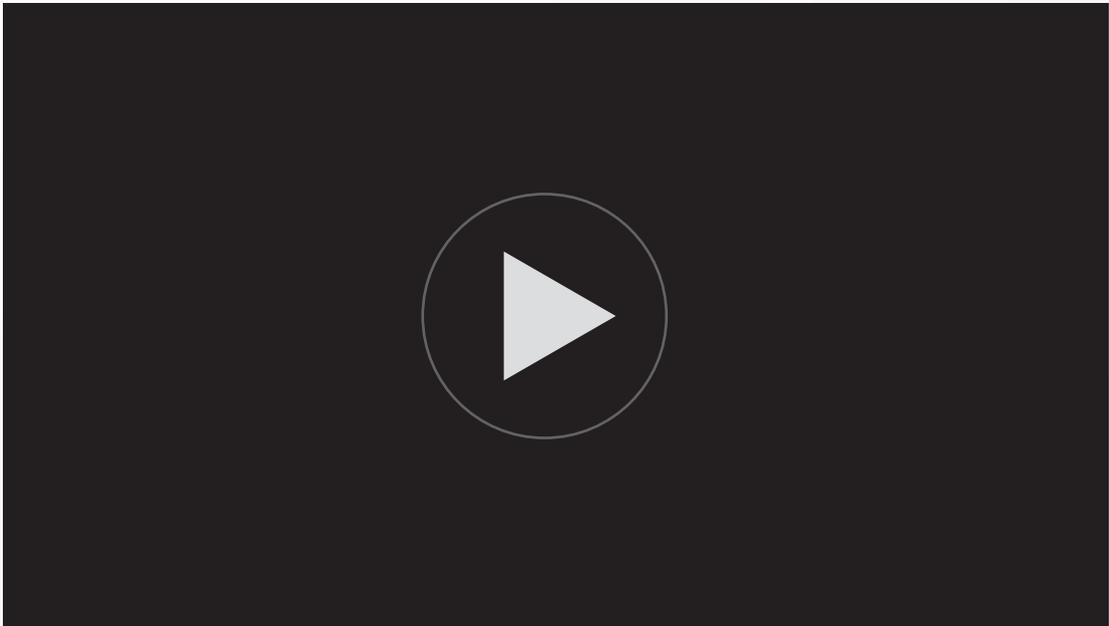
According to best-selling author and five-time tech entrepreneur Josh Linkner, we should not only be willing to cannibalize our core products but should actively embrace the notion.

The new Love My Credit Union member-centric database is part of the automated marketing solution and Rewards platform. It is slated to launch early in the second quarter of 2019 and it's built to innovate, grow and thrive in our modern world of digital marketing. Substantial improvements to the platform include refreshed branding, a modern design with an improved user experience, intelligent member-centric data analytics that enable contextually targeted messaging, simplified password-less authentication and a stable, future-proofed architecture. Plus, valuable new partner offers will be added to the new marketplace incrementally throughout the remainder of the year.

OFFERING PERFORMANCE AND COMPENSATION SOLUTIONS THAT ENHANCE PRODUCTIVITY

People are a large part of what defines a credit union, and having the right people on board can transform a collection of good ideas into a strong and thriving organization. However, attracting and retaining the best talent is a constant challenge for any organization. And in today's competitive environment, having a lack of robust, automated HR tools and talented personnel is a plan for failure.

Performance Solutions provides the purpose-driven performance management, compensation and planning software needed to manage a credit union's growing workforce. Tools, such as Performance Pro, Compease and Planning Pro, provide a bedrock for the relationship between credit unions and their employees, expanding engagement opportunities, organizing communication and empowering workers with dynamic performance management.





PERFORMANCE PRO

Performance Pro provides credit unions with best-in-class performance management technology to improve employee performance and engagement. The system automates and can significantly simplify an HR department's workload.



COMPEASE

Compease is a total employee compensation solution that provides employers with the tools, information and consulting needed to manage salary administration with ease and confidence. Compease provides more trusted salary data sources than any other compensation software in the market and is the only one to use salary data from CUNA.



PLANNING PRO

Planning Pro is an all-in-one tool that handles strategic board management and staff planning in an automated process. The application includes accountability tracking and progress reports, generates custom presentations and leverages data from call reports for quick peer comparisons.

PERFORMANCE SOLUTIONS



PERFORMANCE SOLUTIONS: WHAT'S NEW

THE LEARNING CENTER (TLC 360)

Credit union-focused learning management that streamlines professional development

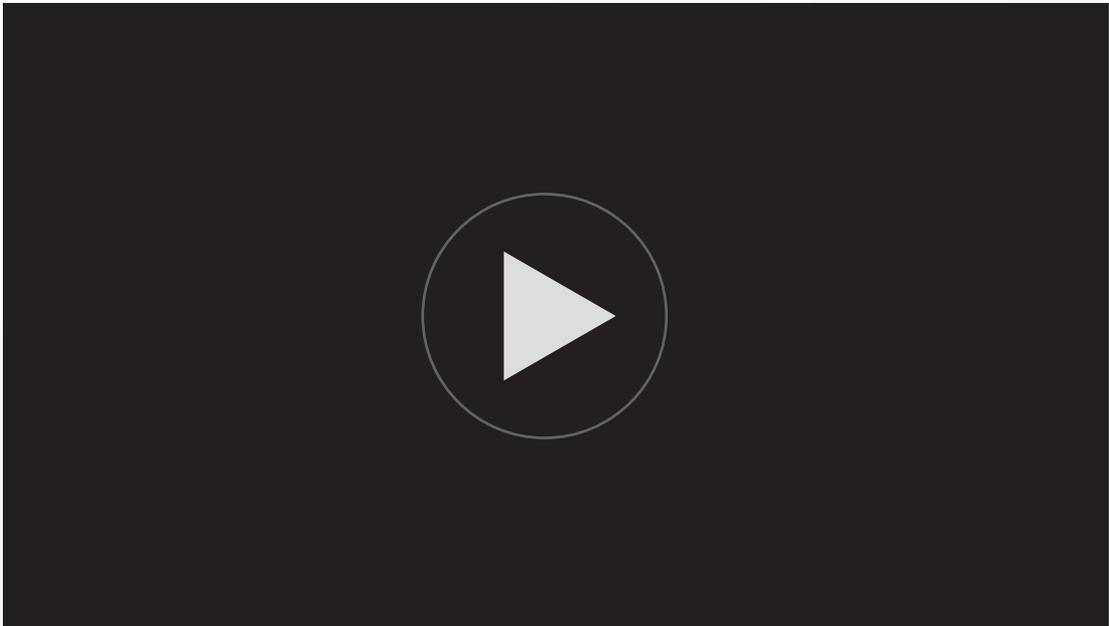
TLC 360 can support the purpose of employee learning and development needs, including their regulatory and compliance training requirements. By combining an integrated learning management system with an extensive library of courses, TLC 360 can maximize the training investment in a credit union's most important resource — its employees.

The full-featured training solution maximizes training investment while providing learners with more than 100 credit union courses and exams. Its easy-to-use interface can be customized to match a credit union's brand, and employee information can be preconfigured before delivery, providing credit unions with a seamless experience.

OFFERING TAILORED STRATEGIES THAT DRIVE ORGANIZATIONAL GROWTH AND RETURN ON INVESTMENT

To stand out among their competitors, credit unions need industry-intuitive partners who offer insights and solutions that enhance value for members and who are focused on the credit union's big picture. Strategic Advisory Solutions goes beyond the limits of consulting by collaborating with credit unions to craft strategy, modernize governance and measure return on investment through a results-driven approach.

CUSG's long-tenured subject matter experts leverage their knowledge and experience to assess goals, risks and programs to design an actionable plan capable of strengthening bottom-line growth. Through its consultative, client-centric approach, Strategic Advisory Solutions helps credit unions overcome challenges in the areas of executive coaching, strategic planning, governance and risk management.



LEADERSHIP COACHING & SPEAKING

LEADERSHIP, COACHING AND SPEAKING

Strategic Advisory Solutions' advisors work with leadership to drive positive change in their organizations so leaders become more confident, insightful, approachable and part of a stronger network of future leaders.

STRATEGIC PLANNING

STRATEGIC PLANNING

Strategic Advisory Solutions' advisors help organizations develop a progressive and successful strategic plan. Strategic planning sessions include on-site facilitation, trend and peer analysis, consumer research and best practice implementation.

BOARD GOVERNANCE

BOARD GOVERNANCE

Strategic Advisory Solutions partners with credit unions to develop action plans focused on devoting more time to high-priority activities, such as strategic planning, compliance, talent acquisition and retention, performance and risk management.

RISK **MANAGEMENT** & COMPLIANCE

RISK MANAGEMENT AND COMPLIANCE

Strategic Advisory Solutions' industry-specific compliance advisors work to develop a solid compliance program that incorporates best practices to ensure a credit union's safety and soundness.

STRATEGIC ADVISORY SOLUTIONS



STRATEGIC ADVISORY SOLUTIONS: WHAT'S NEW

AFFIRMX COMPLIANCE SOLUTIONS

Reducing risk management workloads, anxieties and costs

In the first quarter of 2019, CU Solutions Group, along with six other leagues, acquired AffirmXCU, LLC, which owns credit union sector rights to AffirmX's patented risk management and compliance solutions.

AffirmX already serves more than 120 credit unions nationwide with bundled and unbundled compliance risk assessment tools and services, including:

- Enterprise risk management assessments
- Regulatory compliance monitoring
- The AffirmX Four Report Package
 - BSA independent audit, annual ACH independent audit, annual SAFE Act independent audit, website compliance review
- IT risk and vulnerability assessments
- Loan review services
- Fair lending risk assessments
- Cybersecurity risk assessments
- ADA compliance verification

STRATEGIC ADVISORY SOLUTIONS: WHAT'S NEW

GOVERNEASE

Empowering sound decision-making through transparent and robust governance

It can be challenging to develop governance best practices that optimize performance and foster member engagement, but Governease makes it easy by simplifying and modernizing governance.

This web-based solution provides a framework for accountability, improvements and reforms, and guides a credit union's best practices. Governease contains a vast library of content that addresses relevant and timely topics, such as CEO succession, conflict of interest, governance assessments, the role and responsibility of the board, and financial literacy.

Providing strategic direction and distinguishing between CEO and board responsibilities, Governease allows the board to easily access sensible, organized directives to make critical united and informed decisions.



STRATEGIC ADVISORY SOLUTIONS



CU SOLUTIONS GROUP THOUGHT LEADERSHIP

CUSG provides thought leadership insights to the credit union industry through the CUInsight-hosted CUSG CEO Connect and its in-house digital publication, CU TrendScan.

CUSG CEO CONNECT

CU Solutions Group formed a partnership with CUInsight to host a monthly written column and accompanying video series called “CUSG CEO Connect.”

Authored by CUSG President/CEO Dave Adams, the series provides credit union-driven insights into technology, marketing, HR performance and strategy. The initiative drives brand awareness and audience engagement by reaching a broad constituency.

CUSolutionsGroup.com/CEOConnect





CU TRENDSCAN

Initially a quarterly digital publication focusing on trending topics in credit union technology, marketing, HR performance and strategy, CU TrendScan has grown into CUSG's home for a wide range of engaging and insightful research, data and written content.

Now publishing shorter, insightful articles daily, CU TrendScan continues to publish long-form, research-driven white papers that are released monthly.

CUSolutionsGroup.com/Trends



CUSolutionsGroup.com