

PRESIDENT'S MESSAGE

Dear Valued Clients,

Welcome to the Spring edition of our newsletter. We are excited to welcome our newest Tellerly clients—SESLOC FCU and Foothill FCU—along with Austin Telco FCU, our newest UNITRI core hosting client. To Geri LaChance, Linnie Gooch, Christopher Mraz and Robert Hernandez: welcome aboard and thank you for placing your trust in us!

In this edition, we highlight our newest case study, featuring Kirkland Financial Services. We showcase WRG team member Joseph Moreno, our Client Services Coordinator who works with many of you. We also share news about WRG's recent and upcoming industry conference appearances. At one upcoming event, I'll be joined by Wescom's CIO, Joseph Pellissery, to co-present on how Wescom is *Enabling Strategy and Execution through Effective Data Management*. A couple weeks later, we'll be discussing this in a podcast with Bank on WipFli.

In other news, we continue to work on the 2023 roadmap projects as discussed in our last newsletter, including Red Hat Linux, SASE and SD-WAN, and Verifone M440s. Each of these will be big new advancements for WRG and our clients.

Thank you for your continued support!



Sincerely,

Dave Cerwinski

dcerwinski@wescomresources.com

WELCOME NEW CLIENTS



Austin, TX
\$2.5 Billion
90,880 Members



Arcadia, CA
\$722 Million
31,436 Members



San Luis Obispo, CA
\$1.2 Billion 57,693
Members

SEE YOU AT THE CONFERENCE!

Did you catch Tim Leahy and Dave Cerwinski at the FICS Annual Users Conference in Dallas?

If not, don't worry! There are plenty of opportunities to catch up with our team at some other upcoming industry events. Please stop by our booth and say hello!

SymWest

May 9-11 | Coeur d'Alene, ID

Cu Strategy Forum

May 10-12 | Ventura, CA

Corelation 12th Annual Client Conference

May 30-June 1 | San Diego, CA



EMPLOYEE SPOTLIGHT

JOSEPH MORENO, CLIENT SERVICES COORDINATOR



Joseph Moreno is a Client Services Coordinator at Wescom Resources Group. Joseph began his Wescom journey in December 2009 as a back office team member at Wescom Credit Union, where he spent nearly 12 years before transferring to WRG in October 2021.

"I started my journey at Wescom Credit Union in the Real Estate Servicing department," Joseph says. "After my six months was up as a temp I was offered a full time position in the department, where I worked for another five years—moving all the way up to a Senior Mortgage Loan Servicing Specialist. From there I transferred to the Computer Operations department, where I worked for another five years."

Joseph credits his time in Computer Operations for providing the opportunity "to meet a lot of the clients I assist today in WRG," an experience that still resonates to this day.

"My favorite part about working with WRG's client credit unions is they all have different needs and setups, so they are all unique in their own way," Joseph adds. "It makes every day something new, as you never know what product our clients will want to add to enhance their own member's experience."

In his current role, Joseph assists WRG's credit union clients with a variety of projects, from automating batch jobs and reports to setting up new network connections with vendors, branches, and servers, as well as setting up new disaster recovery sites.

Throughout his time at Wescom, Joseph has valued the support he's received from his fellow teammates, "who have been a tremendous help in getting me accustomed to my new role."

"The thing I enjoy most about working at WRG is that my team is always willing to help each other out," Joseph says. "We all have different backgrounds and strengths, so it's really nice we are able to step in and help each other out when needed."

Working with his teammates has led to some amazing experiences for Joseph, including attending the "Super Star 2022" event for WRG employees.

"Although I had previous interactions with some of the WRG team during my time at Wescom, this was my first time engaging with all the WRG team at one time," Joseph says. "Everyone had nice things to say about my work and knowledge—it was very welcoming."

When Joseph reflects on the unique value that WRG offers to its clients, he recalls a quote from the Chicago Bulls' great, Michael Jordan: "Talent wins games, but teamwork and intelligence wins championships."

"At WRG, we have all three."

CASE STUDY

KIRKLAND FINANCIAL ENHANCES SECURITY AND RELIABILITY IN MORTGAGE SERVICING WITH UNITRI MANAGED SERVICES FOR FICS®

Our latest case study focuses on Kirkland Financial's selection of UNITRI Managed Services for FICS®, resulting in better reliability, less downtime, and greater peace of mind.

"The WRG team has been very accommodating and super responsive. They take the data integrity aspect as seriously as we do, which is great."

Ted Gregory
President, Kirkland Financial

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