

C O N N E C T I O N S

NEWS | UPDATES | INFORMATION

Welcome New Clients



Meriwest CU
San Jose, CA
\$2 Billion | 11 Branches



Taunton FCU
Taunton, MA
\$231 Million | 4 Branches



Strata CU
Bakersfield, CA
\$324 Million | 21,065 Members



U\$X FCU
Cranberry Township, PA
\$268 Million | 22,541 Members



LIVE



BayPort CU
Newport News, VA
\$2 Billion | 25 Branches

President's Message

Dear Valued Clients,

I hope this newsletter finds you and all of your teams healthy and well.

Since our last newsletter, we've brought two large core processing clients live. Congratulations to the teams at Direct FCU of Needham, Massachusetts and La Capitol FCU of Baton Rouge, Louisiana, for completing their Keystone conversions. We're proud to support both within WRG's managed services solution.

As promised, we've expanded our products and services in recent months to address new areas you've expressed interest in. Our new partnership with Verifone enables WRG to now be your single source for the hardware needed for Tellerly deployments and expansions. We finalized an agreement to soon start providing document imaging to our managed service clients. And most recently, we've launched a new service offering for Keystone business consulting, providing you the expertise to help you optimize your use of the Keystone core system. With each of these, we'll deliver you all the same benefits of scale and process efficiency that you've come to know us for on core operations.

As always, thank you for your ongoing support and partnership. Our team is hard at work on yet more new services and enhancements for you, all the while supporting our new implementations and upgrades. As always, please contact me at dcerwinski@wescom.org or (714) 254-5302 with any feedback or inquiries.



All the best,

Dave Cerwinski

President, Wescom Resources Group

In the News: Strata Credit Union Outsources Core Hosting to WRG



Strata Credit Union (formerly known as Kern Federal Credit Union) was established in February 1949 originally serving Kern County Employees who were looking for a better way to save, borrow, and invest their money. Today, Strata Credit Union has over \$325 million in assets and serves over 21,000 members throughout Kern County, CA.

Strata has chosen to move to Corelation as their core provider and have WRG provide core hosting, process management, and business continuity services.

"Strata Credit Union is making great strides to serve consumers, and we're proud the team selected WRG to assist along its journey," WRG Director of Sales and Marketing Kerry Schiappa said. "Our core hosting possesses an incredibly experienced team to alleviate credit unions' operational burdens and streamline their success. We can't wait to get started!"

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Employee Spotlight: SONIA SAFRI | Client Services Manager

We are pleased to recognize Sonia Safri in this issue's Employee Spotlight piece.

Highly regarded by clients, colleagues and partners, Sonia exemplifies a commitment to service in the role of WRG's Client Services Manager. As the lead in delivering excellence to our clients, Sonia feels fortunate to have worked for Wescom Credit Union and learned the "Wescom Way" which focuses on service to members. Leveraging that experience in her role at WRG, Sonia encourages her team to apply service as a top priority.

Having been a part of WRG since 2004 makes Sonia one of the few WRG 'originals.' And true to being a devoted member of the WRG team, Sonia recently celebrated her 35th work anniversary. Sonia is passionate about building strong relationships and utilizing a team approach to deliver prompt, consistent and exceptional service. Her vision is for clients to consider her team as a seamless extension of their staff.

In her free time, Sonia enjoys spending time with her daughter, gardening, going on road trips and being outdoors enjoying southern California's sun.



Upgrade Branches to Your Credit Union's Digital Member Experience

Member expectations have been evolving, but the COVID-19 pandemic shifted them into overdrive. As their expectations have changed, your delivery of products and services must change as well. In a time when social distancing and masks will likely remain the norm in public, have you considered the impact to member experience as they begin returning to your branches?

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5+ Benefits to Outsourced Core Hosting and Managed Services

There are many benefits to outsourcing your core hosting and the various levels of managed services a credit union leader might consider, from potential IT hardware and data center investment savings to personnel savings (particularly in the high-priced tech space) to compliance and more. That means your credit union can refocus your team on doing what they do best: **Serve the members.**

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We sincerely value your business and thank you for your continued support and collaboration! —Team WRG



Kerry Dolan Schiappa
Director of Sales & Marketing



Patti Quinteros
Director of Projects & Implementations



Mark Monsees
Product Manager



Sonia Safri
Client Services Manager