Product offerings

The Association offers a variety of products designed to help your credit union with compliance, policies, operational overviews and strategic planning at cost saving prices.

The cost of any of our services can be spread out over the life of the project for ease and convenience in your budgeting process.

To find out further information on CUANM Consulting services please call Amy Vigil at 1-800-366-6628 ext 2222 respectively or e-mail
amy@cuanm.org
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COMPLIANCE REVIEWS

Regulatory compliance is an ever changing environment making it a challenge to keep up with current law and ensuring your credit union is in compliance with policy and procedure. Your association can customize a systematic review ranging from a review of just a few regulations to an entire review of all regulations. This service not only looks at your forms but evaluates what is happening at your contact point with the membership. This service can also include some training for your front line staff.

POLICIES

Policies are required by your regulator as a way of managing operations of the credit union. The Association's policy service is customized to review you actual operations and develop polices which best serve your individual credit union needs. An experienced Credit union professional will make recommendations on improving operating procedures as well as making sure that policies comply with relevant regulations.

OPERATIONAL REVIEW

Today's economy has credit unions struggling with earnings. Managing your operational efficiencies can help your credit union survive in the future. This service will evaluate all operating functions to gain efficiency and use current technologies to reduce cost. An experienced credit union professional will evaluate staffing levels, procedures, and your current

expenses to help improve earnings.

CREDIT UNION TUNE-UP

With a slow economy, low spreads, increased charge-offs, continued NCUSIF insurance premiums and the possibility of future inflation, credit unions are facing tremendous challenges. This service will evaluate all aspects of the credit union to improve operating results. This includes the following:

1. An operational review for efficiencies and cost reduction
2. Fee income analysis
3. Investment strategies to prepare for future inflation
4. Lending analysis for performance improvement including loss control and marketing

STRATEGIC PLANNING

Strategic planning is essential in steering through turbulent times. With financial institutions facing heavy regulation, a tough economy and staffing concerns it is essential to have a plan. The Association offers Strategic Planning Services that not only help you chart your course but also keep you on course! This includes a traditional one day planning session and 18 months of follow up consultation.

ACH and BSA Audits

NCUA audits can be stressful and time consuming for a credit union. In addition, while NCUA visits your office your credit union must still perform its daily operations. The Association can help! Our BSA and ACH consultant will perform both audits at your convenience and by having both scheduled under one contract you save on the price. This service provides you with a clear understanding of where you are regarding ACH and BSA compliance as well as next steps should that be necessary for your credit union. Our audit service will save you time and money as well as give you peace of mind if NCUA pays you a visit!

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