



# InvestorKeep *Fees, fit, quality, monitored 24/7.*

## THE PROBLEM

- The need for credit unions to enhance and elevate their digital banking strategies is more important than ever.
- Rapidly changing socioeconomic and technological trends are putting pressure on the traditional credit union business model. In a time when growing income is limited, it's important to find other ways to generate revenue.
- 88% of financial institutions feel threatened that they'll lose revenue to robo banks and standalone fintechs.
- Budgeting, expense tracking, saving and investing are all areas of growing consumer demand with shifted expectations toward instant on-demand services to access basic financial services, save money, and learn how to better manage money.
- Financial professionals have divided attention between accounts leading to things going unnoticed.

## THE SOLUTION

**InvestorKeep (IK)** is a financial monitoring and analysis platform designed to identify revenue opportunities for the credit union while protecting members from losing money.

- Engage with members and convert accounts held away
- Inform and educate members to adopt sound financial habits throughout their savings and investment lifecycle

## CREDIT UNION BENEFITS

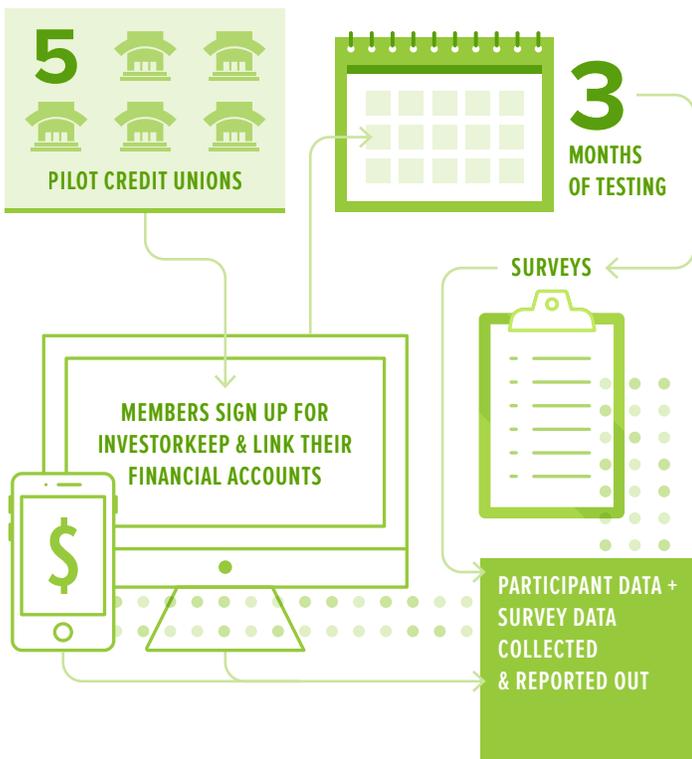
Reduce the front-end risk of testing a new product and accelerate decision-making and growth by:

- Reducing the cost and time to identify and evaluate a new product
- Win business using granular data
- Empower members to make strategic financial decisions
- Build member loyalty through this member engagement tool

Participating credit unions are also provided with competitive data intelligence to gain insights of product offerings and competitor interest rates.

No formal partnership or core integration with IK is required and there is no cost to to participate in the test.

## HOW THE TEST WORKS



## CREDIT UNION ACTION ITEMS

- Designate a test project manager and assign one employee to support members using IK over the course of the study.
- Identify a sample size of your membership to send the email offering to participate in the pilot; distribute Filene pre-crafted email.
- Conduct bi-weekly 15 minute check-in calls with Filene to monitor testing progress.
- Track new sales made or new accounts opened as a direct result of IK alerts.
- Give qualitative feedback on the IK marketing toolkit.