These are just the first 631 reasons to choose CRMNEXT.

DIGITAL SUPPORT: 25 | DocuSign: DocuSign new template/envelope request, Update previous submitted on DocuSign, DocuSign Admin Privileges. **Online Banking Support:** Bill Pay issue, E–statements, Online Banking Feedback, Online Banking Recommendations, Video Banking Help/Questions, Online Banking Request, Online external transfer issue, Suspend/Reinstate Online Services, Online Banking Support – Pop Money, Online Banking Support – External Transfers, Online Banking Support – Internal Transfers, Online Banking Support – Quicken/Quick–books, Online Banking Support – Money Management, Online Banking Support – Mobile Banking, Online Banking Support – Limit Increase – POP Money. **Mobile Banking Support:** Zelle Issue, Mobile Deposit Increase, Mobile Banking Feedback, Mobile Banking Recommendations, Mobile Banking Issue, Mobile Deposits Issue, Mobile Wallet Issue. **CONSUMER LENDING SERVICES: 26 | Rate Amendment:** Consumer Rate Amendment, HELOC Rate Amendment, Mini Rate Amendment. **Warranty:** Add Warranty, Remove Warranty. **Loan Maintenance:** Changes of Due Date – Auto Loan, Changes of Due Date – Vehicle Loan, Changes of Due Date – Personal Loan, Changes of Due Date – Shared CD, Changes of Due Date – Secured, Payment Reversals, Title Requests, Add/Change Debt Protection, Add/Remove Vehicle Protections. **Payment Protection:** Payment Protection Claims, Add/Remover Payment Protection. **GAP:** GAP Claims, Remove GAP. **Loan Servicing:** Move Consumer Loan Account, Misc Loan Request, Skip a pay, Request to lower rate, Loan Payoff requests, Loan Payoff amount short, Loan Payment change exceptions, Loan Payment errors. **BUSINESS LENDING SERVICES: 21 | Business Online Account Access Support:** Business Online Account Access Support – Banking Issues, Business Online Account Access Support – Mobile Banking Issues, Business Online Account Access Support – Business Account Closures, Signer Change. **Business Deposits:** Business Account Transfers, Business Account Changes, Business Online Banking. **Limit Increase Request:** Limit Increase – RDC Request, Limit Increase – ACH Request, Limit Increase – Wire Request, Limit Increase – Business Bill Pay Request, Limit Increase – Business Mobile Request. **Business Lending Services:** Business – Loan Questions (errors/issues/maintenance), Business – Documentation/Income Requirement questions, Business – Entity requirement questions, Business – Delinquency, Business – Payment Questions, Business – Add/Remove Authorized Signer, Payoff Request, Business Lending Inquiry – Other/Miscellaneous. **Business Account Analysis Fee Research:** Business Account Analysis Fee Research. **MARKETING & COMMUNICATION: 16 | New Request:** QR Code – New Request, Marketing New Request. **Website Errors:** Website report errors/request change. **Brand requirements/adherence:** Brand requirements/adherence. **Social Media Concerns:** Social Media Concerns. **Donation Requests:** Social Media Requests. **Surveys/Research:** Remove voice of the member survey from agent and/or branch dashboard, Question on voice of the member survey, Member questioning why they received a survey. **Emails:** Email Inquiries/Responses, Marketing Email Opt out. **Communications:** Marketing Letter Inquiries, Marketing Communication Opt Out, Promo clarification. **Partnerships:** Partnership requests, Media coverage/interview requests. **FRAUD SERVICES: 20 | ACH Fraud:** ACH Fraud. **ATM Fraud:** ATM Empty Envelope, Card Skimmer, PIN Fraud. **Business Member Fraud:** Business Member Fraud. **Check Fraud:** Check Kiting, ATM Check Fraud, Retail Branch Check Fraud, Shared Branching Check Fraud, ITM Fraud, Mobile Deposit Fraud, Stolen Checks. **Counterfeit Currency:** Counterfeit Currency. **Elder Abuse:** Elder Abuse. **Identity Theft:** Identity Theft. **Loan Fraud:** Loan Fraud. **Mail Fraud:** Mail Fraud. **New Account Fraud:** New Account Fraud. **Law Enforcement:** Law Enforcement Requests, Subpoenas. **ACCOUNTING: 12 | Balancing Issues:** ATM/ITM Balancing Issues. **Foreign Currency Orders:** Foreign Currency Orders. **General Ledger Access:** General Ledger Access. **Shared Branching Adjustments:** Shared Branching Adjustments. **Tax Form/IRS Reporting:** Tax Form – Member Correction, Tax Form – Member Inquiry. **Accounts Payable:** Corporate Card Statements, Expense Reports. **Accounting Correction:** Accounting Correction Request. **Stop Payment:** Submit Affidavit Form, Submit Stope Payment Form. **ACH Dispute:** ACH Dispute. **DEPOSIT OPERATIONS: 25 | Deposit Errors:** Account Processing Error. **Transfers:** Balance Transfer, Auto Transfer, External Auto Transfers. **Check Book Balancing:** Check Book Balancing. **Negative Checking Accounts:** Overdraft Opt–In on Debit Card (Reg E), Overdraft Privilege – Remove per Member, Reverse Direct Deposit from Negative Checking, Payment on Charged–Off Checking Account Balance, Repayment Plan for Negative Checking Account, Negative Checking Account Balance, Overdraft Privilege Eligibility. **Encoding Error:** ATM Deposit Item Entered for Wrong Amount, Branch Deposit Item Entered for Wrong Amount, Mobile Deposit Item Entered for Wrong Amount, Check Cleared for Wrong Amount. **Check Scanning:** Check Scanning and Proof Balancing, Foreign Check Deposit. **Payroll:** Add an Account to Payroll Distribution, Change Next Payment Date for Payroll Distribution, Change Amount for Payroll Distribution, One–Time Change to Payroll Distribution, New Payroll Distribution Setup Request, Remove Account from Payroll Distribution, Skip Payment. **OPERATIONS SUPPORT: 25 | HSA Requests:** HSA Change Beneficiary, HSA Contribution, HSA Withdrawal, New HSA Family, New HSA Individual, HSA Tax Documents. **Roth IRA Requests:** New Roth IRA, Roth IRA Change of Beneficiary, Roth IRA Change of Investment, Roth IRA Contribution, Roth IRA Withdrawal, Roth IRA Tax Documents, Roth IRA Required Minimum Distribution. **Traditional IRA Requests:** Traditional IRA Required Minimum Distribution Request, New Traditional IRA, Traditional IRA Change of Beneficiary, Traditional IRA Change of Investment, Traditional IRA Contribution, Traditional IRA Withdrawal, Traditional IRA Tax Documents. **Document Review:** Document Review Request. **Statement Issues:** Statement Issues. **Account Maintenance:** BillPay Cancellation, eStatement Cancellation, SSN/TIM correction. **BRANCH MANAGERS/LEADERSHIP/EXECUTIVE MANAGEMENT: 5 | Services:** Reinstating Services. **CD Rate Match:** CD Rate Match. **Fee Refund Request:** Fee Refund Request – Exceeding Limits. **Policy Exception Request:** Policy Exception Request. **Heightened Branch Situations:** Heightened Branch Situations. **BRANCH: 32 | Member Information Required:** Member Information Required – Business Accounts, Member Information Required – I502 Accounts, Member Information Required – BAQ, Member Information Required – Signature Cards, Member Information Required – Home Equity, Member Information Required – COBO (Certification of Beneficial Owner), Member Information Required – Identification, Member Information Required – CTR (Currency Transaction Report), Member Information Required – [illegible] Activity Report, Member Information Required –ATM Deposit Disputes, Member Information Required – Card Holder Disputes, Member Information Required – Fraudulent Use of Card, Member Information Required – [illegible] ACH Dis[illegible] Requi[illegible] – [illegible] IRA Documents, Member Information Required – HSA Documents, Member In[illegible] Review, Mem[illegible] Loan [illegible] Information Required – Acc[illegible], Member Information Required –TIN Corrections, Member Information Required – Other. **Misc. Requests:** Loan closings, Notary request, Check order request, Resea[illegible] request, Deposit subpoena. **Emergency Alert:** Emergency Alert Email group. **ATM Issues:** ATM Troubleshooting, Branch – ATM Issues, Member – ATM Issues, Remote ATM Issues. **CARE CENTER/ CONTACT CENTER / EBRANCH: 14 | Fee Refund Requests:** ACH Fee Refund, ATM Fee Refund, Bad Address Fee Refund, Courtesy Pay Fee Refund, Inactive [illegible]und, Loan Late Fee Refund, NSF Fee Refund, [illegible] transfer Fee Refund, Overdraft Transfer Fee Refund, Returned Item Fee Refund, Visa Late Fee Refund, Other Fee Refund. **Member Services:** Travel Notes, Mail State[illegible] **ME[illegible]BER SER[illegible]CES: 56 | Me[illegible]ber [illegible]ount Mai[illegible]** [illegible] Ownership change request, Account Ownership ch[illegible] request, Add/Remove Joint Owner, Change Address/Phone/Email, Close Mem[illegible] Ge[illegible] re[illegible] Member Class C[illegible]ge, [illegible] Depos[illegible] Acc[illegible] to Othe[illegible] [illegible] requests/r[illegible] Veri[illegible]tion of deposits. **Loss Mitigation:** Loss Mitigation Request. **Disaster [illegible]** [illegible] **Legal:** Pow[illegible]orney[illegible] **[illegible]ber C[illegible]plaint:** A[illegible]ut an [illegible] Comp[illegible]t. [illegible] Check Order Maintenance Request. **Certificates:** Certificate/share rate issues, Certificate/share rate changes, Certificate Maintenance, Certificate Dividends, Certificate Early Withdrawal Penalty, Certificate Rate Match. **Collection Forms:** Notice of Bankruptcy – With Bankruptcy Notice, Notice of Bankruptcy – With[illegible]t Bankruptcy Notice, IRS or Child Support Levy – Letters [illegible] IRS or Summons, Judgment / Garnishments Summons, Consumer Disputes – Credit Disputes and Debt Management, Mortgage Summons/Foreclosure, Debt Manage[illegible]nt Letter – Credit Disputes and Debt Management, [illegible] Extens[illegible] [illegible] of [illegible] Claim[illegible] No[illegible] Forbear[illegible] Mortg[illegible]e, Disability/Life Claims, Voluntary Affidavits (Repossession). **Insurance, CPI, Claims [illegible]** [illegible] Insuran[illegible] CPI, Cla[illegible] [illegible]n or [illegible]ulation [illegible]nsurance, CPI, Claims Request from Member, Member Totaled Vehicle – Insurance, C[illegible] need LO[illegible] [illegible] Me[illegible] **[illegible]** [illegible] Membership Application Status, Online Membership Application Debit Card Order, Locked out of Online Membership Application, Restricted Account, Recover Online Membership Application ID Number, Resume an Online Membership Application, Start an Online Membership Application. **Member Callback:** Account Pop–Up "Contact Member Solutions", Delinquent Loans, Charge–Off Loans, Loan Deferment, Payment to Past–Due Loan, Repayment Plan for Past–Due Loan, Settlement Request, Fees – Late Consumer Loan Payment. **Wire Transfer Requests:** Wire Transfer – Outgoing, Wire Transfer – Update Password. **QUALITY & COLLATERAL: 15 | Title Request from Member:** Relocation – Title Request from Member, Release – Title Request from Member, Lien Satisfaction/Payoff Letter – Title Request from Member, Other – Title Request from Member. **Internal Title Questions or Request:** Title / Sales Tax fee quote – Internal Title Questions or Request, Form requests / verifications – Internal Title Questions or Request, Process / Procedural issue – Internal Title Questions or Request, Conflict with Dealer / Member – Internal Title Questions or Request. **Stock Request from Member:** Stock Sale – Stock Request from Member, Stock name change or TOD add/delete – Stock Request from Member, Stock Release – Stock Request from Member. **Internal Stock Question or Request:** PSM Stock Form verification – Internal Stock Question or Request, WRA Question – Internal Stock Question or Request, Stock release issue with PSM – Internal Stock Question or Request, Stock Transaction Status – Internal Stock Question or Request. **DECEASED MEMBER: 1 | Deceased Member:** Deceased Member. **IT INFRASTRUCTURE: 27 | ATM:** ATM Troubleshooting. **Encompass:** Encompass Troubleshooting. **ID Scanner:** ID Scanner Troubleshooting. **iPad:** iPad Troubleshooting, iPad Equipment. **Keyboard:** Keyboard Request, Wireless Keyboard Request. **Laptop:** Laptop Request, Laptop Troubleshooting. **Monitor:** Monitor Request, Monitor Replacement. **Mouse:** Mouse Request, Wireless Mouse Request. **Security Camera:** Security Camera Software. **Speakers:** Speakers Replacement, Speakers Request. **TCR:** TCR Network Issues. **Temenos:** Temenos. **View:** View Troubleshooting. **Workstation:** Computer Replacement, Computer Request, PC Replacement, PC Request, ThinClient Replacement, ThinClient Request, ZeroClient Replacement, ZeroClient Request. **IT SECURITY: 6 | Carbon Black:** Blocked Popup, Request to Allow App. **FireEye:** Email – Blocked or Quarantined, Quarantined Email. **Last Pass:** Last Pass Troubleshooting, Last Pass Password Rest. **IT SUPPORT SPECIALIST: 63 | Adobe:** Adobe Login, Adobe Troubleshooting. **Bill Pay:** Bill Pay Troubleshooting. **Burst:** Burst Troubleshooting. **Check Scanner:** Check Scanner Troubleshooting. **Chrome:** Chrome Troubleshooting. Clickswitch. **Coin Machine:** Coin Machine Troubleshooting. **Deposit Pro:** Deposit Pro Troubleshooting, Deposit Pro Troubleshooting. **Docusign:** Docusign Resend Envelope, Docusign Troubleshooting, Docusign Troubleshooting. **eFunds:** eFunds Troubleshooting. **Excel:** Excel Troubleshooting. **Interaction Desktop:** Interaction Desktop Troubleshooting, Incoming Calls, Outgoing Calls. **Interaction Voicemail:** Voicemail Troubleshooting. **Internet Explorer:** Internet Explorer Troubleshooting. **Keyboard:** Keyboard not working. **Laptop:** Branch WiFi, Can't connect to Internal, Laptop not working. **Microsoft Teams:** Teams button missing, Teams login issue, White Box for teams. **Monitor:** Dual Monitor Setup, Monitor Troubleshooting. **Mouse:** Mouse Troubleshooting. **Navigator:** Navigator Troubleshooting, Navigator Login. **New User:** New User Setup Request. **Outlook:** Missing Folder in Outlook, Outlook Password, Email Signature in Outlook, Suspicious Email. **Phoenix:** Phoenix Permissions. **Polycom:** Polycom Audio, Polycom Troubleshooting, Polycom Video. **PowerPoint:** PowerPoint Troubleshooting. **Presto:** Presto Troubleshooting. **Printers:** Add New Printer, Missing Printer, Printer Troubleshooting, Set Default Printer. **Printscreen:** Printscreen Setup, Printscreen Troubleshooting. **Signature Pad:** Signature Pad Com 1 Error, Signature Pad Troubleshooting. **Speakers:** Speakers Troubleshooting. **TCR View:** Can't login to View, Missing Files in View, Missing Shortcut in View, View frozen. **Word:** Word Document. **Workstation:** Computer Troubleshooting, PC Troubleshooting, ThinClient Troubleshooting, ZeroClient Troubleshooting. **ZixOne:** Zixone Login, ZixOne Permissions. **IT SYSTEM ANALYST: 13 | Deposit 24/7:** Deposit 24/7 New User, Setup Request. **Laser Pro:** LaserPro Missing Printers, LaserPro Troubleshooting. **Onbase:** Onbase Login, Onbase Report Missing, Onbase Scanning Permissions. **Phoenix:** Phoenix Troubleshooting. **Velocity:** Velocity Calculator Error, Collateral in Velocity, Velocity IQQ Interface, Velocity App, Velocity Blank Disclosures, Velocity Troubleshooting. **SOFTWARE DEVELOPMENT: 37 | Internal Web Apps:** Promotions – Member Giveback Tool, Intranet Tool, Thank Use Dashboard, Wire Transfer Form, Contact Queue. **Phoenix:** Approve/Reject a Cross Sale/Referral, Record a Cross Sale/Referral, Cross Sale Quick View. **Sale Tracker:** Approve/Reject a Cross Sale/Referral, Record a Cross Sale/Referral, Cross Sale Quick View. **Online Banking:** Apply for a Loan, Change Account Information, Add New Account in Savings Goal and Sub–User, Enable/Disable eNotifiers, Enable/Disable SMS banking, Enable/Disable Two–Step Verification for Mobile App and Login, Mobile Deposit Troubleshooting, Refer–A–Friend for Transfer Between Accounts and External Account Transfer, Order Checks Online, Pay Loan Escrow Shortage, Bill Pay, Email Transaction Alerts, Text Transaction Alerts and Registration, Pay Pause, View Credit Card Transactions Online, View Credit Score on Bright Track, Statements in, Thank You's in, View Transactions Online. **TELLER SERVICES: 2 | TCR: Password Resets:** Rochester Password Reset, TCR Troubleshooting. **TRAINING: 36 | Member Service Training Request:** Account Ownership Training, Business Services 102, Certificate Training, Credit History Lesson, Deceased Account Training, HSA Basics Training, IRA Basics Training, IRA Investment Changes Training, IRA Withdrawal Training, Member Discovery. **All Training Request:** Business Services 101, All Conference, Experience, Engaging with Deposits, Let's Grow Deposits, Making Connections, Money Makeover Clinic, Onboarding Training. **Leadership and Development Training:** Advancing Leaders, Emerging Leaders, New Supervisor Training. **Teller Training Request:** Phoenix Training, Teller Live Training. **Loan Training Request:** Close End Home Equity, Mini Mortgage, Mobile Home, Home Improvement Training, Consumer Lending and Funding Classroom Training, Consumer Lending and Funding Live Training, Underwriting, HELOC Training, Taking the Application Live Training, Taking the Application Training, ULEND Training, University of Lending – Chicago, Visa Training. **WORKFLOW: 5 | Workflow Request:** Enhancement Request to an Existing Workflow, Request for a New workflow, Request Update to an Existing Workflow Due to Compliance. **Workflow Troubleshooting:** Workflow Error, Workflow Error – Can Proceed. **HELP DESK: 2 | MRM:** MRM Feedback, General Support. **COMPLIANCE: 14 | Compliance:** Compliance – Membership agreement questions, Compliance – Lending regulation questions, Compliance – SAR questions, Compliance – Vendor due diligence, Compliance – Contract review, Compliance – Truth in lending – disclaimer questions, Compliance – Member escalation issues, Compliance – Legal consultation, Compliance – OFAC Flags – Credit reports, Compliance – CFR's, CTR's, Compliance – NCUA Complaints, Compliance – Alert Adverse activity – Kiting, MSB, Compliance – Disclosure creation/review for marketing contest rules, SAR's. **REPORTS & DASHBOARDS: 6 | Dashboard Requests:** Dashboard Error, New Dashboard Request. **Report Requests:** Change to Existing Report, Report Request for External Audit/NCUA Exam, New Report Request, Report Access. **MARKETING – EMPLOYEE: 38 | Data:** Request list for contacting members, Request for charts, graphs, or data points. **Volunteering:** Employee volunteer opportunities (outside of sponsorships). **Digital:** Website updates. **Print collateral:** New brochure/handout creation, Stationery replenishment (letterhead, envelopes, notecards), Business cards/notepad request, Training material requests, HR material requests, New staff onboarding material, Member book, Member book – Business edition, Real Estate handouts/fliers, Newsletter supply, Annual Report supply. **Brand Products:** Displays/sign holder requests. **Content:** Member impact stories, Video requests, Blog requests/updates, PowerPoint/presentation updates/creation. **Events:** Trade/home shows, Garage Sale questions/submissions, Member events and discounts, Seminar, webinar, Facebook Live request. **Media:** Media/advertising requests, Media coverage/interview requests. **Photography:** Staff photo requests, Member/branch photos. **Signage & branding:** Logo requests, Signage – Exterior, Signage – Lobby & Door, Signage – Holiday Hours, Table Cloth, Banners and displays, Codigo (lobby TV), Marquee, ATM/ITM wraps. **Sponsorship:** Sponsorship requests.

Faster, Less Expensive Integration with Jack Henry Core Platform.

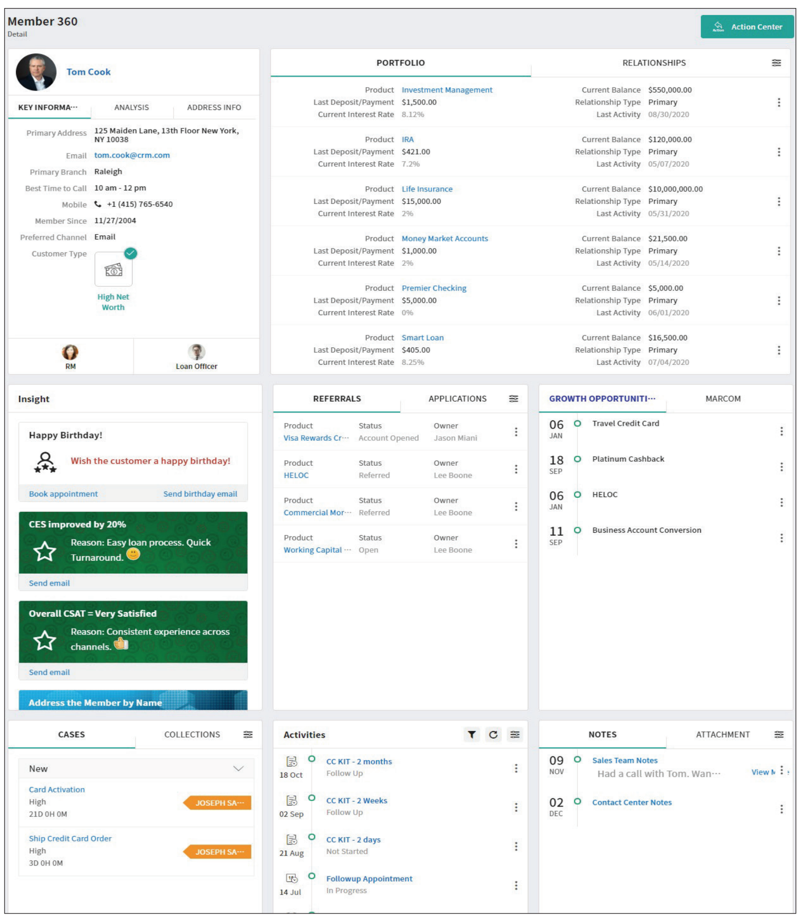
As a Jack Henry™ Vendor Integration Program (VIP) Member, CRMNEXT has direct access to Jack Henry's technical resources. Our **Symitar Out-of-the-Box** integration can get your team up and running fast—sometimes MONTHS faster and often at a savings of tens or even hundreds of thousands of dollars.

Symitar – And THEN Some! We integrate Symitar with all your applications into one simple, easy-to-use member view.

All Member Data on 1 Screen

See all member data aggregated from the Jack Henry core and your internal and 3rd-party systems on one screen. All departments get real-time insights into:

- member personal info
- products & transaction history
- near real-time status updates
- event creator/resolution assignee
- service and complaint
- referrals/leads
- notes and history
- outstanding tasks & appointments
- next best offers
- pre-approved products
- access to uploaded documents
- real-time maintenance requests



Reduce Re-Work, Increase Member Satisfaction

CRMNEXT's Symitar Out-of-the-Box integration was created to help you and your team simplify work & drive growth. We empower your team to immediately address member needs and automate tasks—no sticky notes needed on monitors in other departments.

Priceless Viz

Know what's happening on cases or service requests, who's working them, as well as member status.

Low-Hanging Fruit—Leads

Automatically assigned cross-sell opportunities include deposits, loans, mortgages, wealth, insurance, digital banking, and treasury services. To name a few.

Keep-in-Touch (KITs)

Simplify member outreach with customizable programs for member-based activities that can be scheduled on calendars and synchronized with Outlook or Google.

Real-Time Account Maintenance

Action Centers push member and account updates made in CRMNEXT to Symitar core or other third-party systems in near real-time. How's that for efficient?

Learn More at:

crmnext.us/SymitarBox

CRMNEXT