

ALLOYA UPDATE

SEPTEMBER 2021 |



Great rates move fast. With SimpliCD Online, you can move faster.

Securing a great yield on a certificate of deposit (CD) is easier said than done. So, when the markets and time are seemingly not on your side, how do you compete?

Start with Alloya Investment Services. In partnership with SimpliCD, a brokered certificate program provided by Primary Financial, clients of Alloya Investment Services can invest excess funds in fully insured certificates offered by banks and other credit unions with nothing more than a single set of login credentials. With the power of Premier Portfolio, the online investment management system provided by Alloya Investment Services, credit union decision-makers gain access to the SimpliCD Online trading platform where the investment magic happens.

SimpliCD recently enhanced its online platform to make it easier for you to outpace fast-moving rates and build your best-yielding portfolio.

What's new in SimpliCD Online?

In-App & Push Notifications For New Rates – Receive timely notifications the moment new rates are added to SimpliCD Online – *even if you are not logged into the system!* Plus, you can purchase certificates directly from the notification, so you can purchase limited rates before they sell out.



Customized Rate Notifications – Customize your notifications so you only see the rates that meet your criteria – such as a specific term. When the criteria no longer meets your credit union's needs, easily modify it or set it to expire to eliminate unwanted notifications.

Rollover Rate Notifications – Receive a notification as soon as an issuer offers rollover rates for your upcoming maturities.

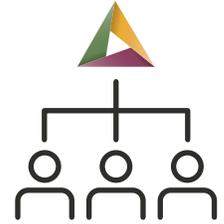
SimpliCD vs. Treasury Report – See how the rates in your SimpliCD portfolio stack up against Treasury rates using this newly added reporting feature.

Who said investing can't be easy? Contact your Alloya Investment Services representative or invest@alloyacorp.org to learn more about the powerful tools offered by Alloya Investment Services and SimpliCD. Our job is to make your job easier.



PSA For Your KOCs!

To ensure information gets to the right person, Alloya directs messages to key individuals at each member credit union based on their area of responsibility. These key individuals, also known as Key Organizational Contacts (KOCs), are managed in Premier View.



Alloya offers eight types of KOCs and recommends regularly reviewing the individuals you have assigned to those roles in case updates are needed. For example, if your credit union's CEO retires, you will need to appoint a new contact for the "Lead Manager" role. Follow these four easy steps to update your KOCs!

- 1 Log in to Premier View and navigate to the Key Organizational Contacts screen.
- 2 Click the *Edit* button next to the individual you would like to update.
- 3 Modify the user information and/or responsibilities as necessary.
- 4 Click *Save* and you're set!

Contact Member Services at memberservices@alloyacorp.org with any questions.

Change of Mailing Address For Check & Bond Processing

ICYMI (in case you missed it): Last month, Alloya announced an operational change for check and bond processing. Alloya no longer accepts these items by mail in our Westminster, CO office. Instead, credit unions should mail these items to Alloya's headquarters in Naperville, IL (address below).

Alloya Corporate FCU
184 Shuman Boulevard
Suite 400
Naperville, IL 60563

As a reminder, Alloya offers an array of check processing and funds transfer solutions that preclude the need to mail checks to us for processing. Our Member Services team is happy to discuss these solutions with you and help you identify the option that best meets your credit union's needs.

Contact memberservices@alloyacorp.org.

Member Survey Coming September 15!



It's that time of year! Alloya's annual Member Survey will open for your feedback on Wednesday, September 15. Keep an eye on your inbox for an email invitation to the online survey. It will take five minutes or less to complete and responses will be collected through Friday, October 1. Your perspectives matter and make a difference.

Because we know it's not just what we do, but how we do it.

New Article By Our Expert!

*Operational Resilience:
Stronger on the Other Side*



Uncover the five key lessons of 2020 that will make your credit union more resilient than ever.

Visit www.alloyacorp.org/articles.



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