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## Reseda Summit Demo

October 4, 2023





# Who is BenefisCU?

# BenefisCU

Moving credit unions from **customers** to **partners** in the advanced insurance solutions market.

Over the last decade, an estimated **\$1B** in revenue has left the credit union movement to for-profit insurance brokerage firms.

Through a national collaboration with other credit unions, your credit union can capture a portion of the profits as non-interest income.

## CU Equity Members:

American Heritage FCU (Philadelphia, PA)

Desert Financial (Phoenix, AZ)

Goldenwest CU (Ogden, UT)

MAPS CU (Salem, OR)

Michigan State University FCU (E. Lansing, MI)

Oregon Community CU (Eugene, OR)

Redstone FCU (Huntsville, AL)

Sandia Laboratory FCU (Albuquerque, NM)

University FCU (Austin, TX)

## Non-CU Members:

Triscend<sup>NP</sup>, LLLP (Dallas, TX)

Dollar Associates (Birmingham, AL)



Individual Consumers,  
Personal Lines

Lack of Scale

Most of the credit  
union insurance  
opportunity lies  
below the surface

A multi-billion-  
dollar opportunity

Advanced Insurance  
Solutions

- Executive Benefits
- Business Protection

Insurance  
Aggregation, or  
Scale Solutions

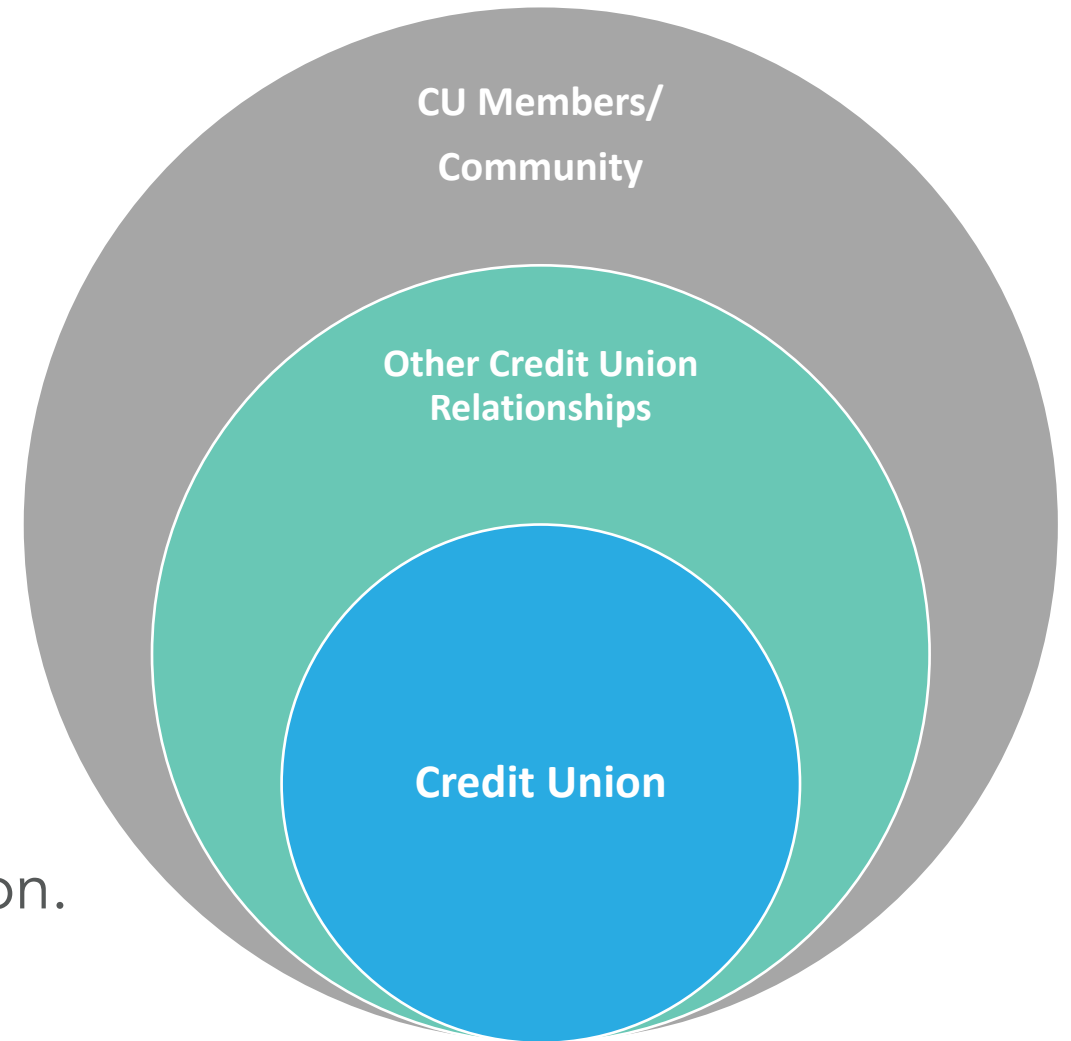
- Specialized Products
- Carrier Contracting

Leveraging the  
experience  
and expertise  
of Triscend<sup>NP</sup>

**Why  
Advanced  
Insurance  
Solutions?**

# Where does the opportunity lie?

- Internal credit union opportunities
- Credit union's network of relationships
- Finally, expand the offering to credit union membership and in the community
  - Enhance connection with existing members
  - Draw new members to the credit union.





# BenefisCU was Profitable in its First Year of Operation

While other revenue-sharing opportunities exist, BenefisCU is the only **national** CUSO with a non-profit executive benefits focus.

Since its launch in January of 2022, BenefisCU,

- Returned 18% on investment to its Equity Members in 2022
- YTD 2023, Equity Member ROI of 21%+

**A successful start...**



## Contact Us to Learn More

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