



## Why CU PolicyPro?

Is your credit union getting bombarded with new regulations, products, or policies? Not quite sure how to smoothly incorporate them into daily operations or to meet regulatory requirements? That's where **CU PolicyPro** can help make your life easier.

The Operations Policy Manual in **CU PolicyPro** contains comprehensive policies and regulatory guidance – developed and written especially for credit unions by regulatory (legal and financial) experts. **CU PolicyPro** is designed for credit unions to customize and implement policies that are particular to the individual credit union. The format is clear and easy to use so you can find the information you need when you need it.

## CU PolicyPro to the Rescue

Stop worrying about regulations, inspectors or other worse case scenarios. **CU PolicyPro** has it all covered with their Operations Policy Manual that is/has:

- Specific to credit unions
- Researched and written by experts
- Secure, Web-based platform with instant worldwide access
- Policy statements combined into a single, searchable volume
- Designed for federal regulatory compliance
- Supports NCUA Examiner requirements of “safety and soundness”
- Policies may be easily customized, modified, added or replaced

## Our Subscription Service Keeps You Up-to-Date

Because policies change, we continually research relevant developments to keep you current. Our subscription service (FREE for the first year) includes:

- Semi-annual updates including new policies and policy rewrites
- Monthly OPS NOTES newsletters covering current issues
- Client support via the toll-free number or email, 9:00 a.m. to 5:00 p.m. *EST*



Ask about our companion products:  
*GovernancePro and PlanningPro*

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**CU**solutions<sup>GROUP</sup>



## Operation Manual Edition

*Our Credit Union has been a user of CU PolicyPro for many years. We have always been happy with its functionality.*

*Since you purchased the tool and Web enabled it, it has been transformed into an awesome tool.*

*I am flying through some policies that we desperately needed and I use your product very easily and effectively.*

*If you have or are developing anything that is similar, I want to know about it. Please keep up the good work.*

**Bill Butler, President/CEO**  
**Ohio Health Credit Union**  
**Columbus, OH**



Key Features	Description
<b>Secure, Web-based Platform</b>	CU Solution Group's secure, Web-based platform provides instant, worldwide access to essential information. You and any authorized staff can securely access, view, print and update your policies from any Internet connection.
<b>Complete Solution</b>	CU PolicyPro provides a complete solution to setting up and maintaining policies including Complete Policy Manual, Monthly OPS Notes, Semi-Annual Updates and Operations Tools.
<b>Manual Builder</b>	"Manual Builder", CU Solution Group's online word processing tool, allows you to easily customize your manual. Because CU PolicyPro is already written in ready-to-use policy format, you can customize your manual using familiar word processing features.
<b>Easily Add New Sections</b>	One simple click creates a new page to be inserted in your manual. By adding the policy number, you determine where the new policy will fall in your manual.
<b>Archive Capability</b>	If a policy is not being used by your credit union, one button click can move the policy from your manual to archive, or can create a copy before updating, making it easy to access for future reference.
<b>Easy Insertion of Semi-Annual Updated Information</b>	For new policies or updated policies with no CU specific customization needed, one to two clicks will insert the new information into your manual.
<b>Library Access</b>	The Online OPS manual contains a Library section, which includes an archived history of all changes made from the Semi-Annual update, as well as all published monthly OPS notes.
<b>Storage Area</b>	The Storage Area provides a place to electronically store published manuals, as well as supplemental documents that can be accessed by authorized staff.
<b>Access to the Master Manual</b>	The online version contains the full text of the Master Manual – for reference or to easily revert back to the master text for any policy.
<b>Access by User</b>	The online version allows you to set different levels of access for staff, from full administrative access to read only access.
<b>Subscription Service</b>	Your subscription not only pays for the online hosting of your manual, but provides you with semi-annual updates, monthly OPS notes to keep your manual current and a toll-free number for technical support.

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