

POCKETNEST

Financial freedom for your members, more leads for you

Pocketnest offers comprehensive financial planning for your members, and innovation and growth opportunities for credit unions.

Use this one-of-a-kind fintech platform to turn transactional members into loyal brand advocates, and increase your cross-sell opportunities and qualified leads.

Why Pocketnest? It's the only financial planning platform that's approachable to users and covers all areas of

financial wellness—from establishing a budget to financial freedom for your members and more leads for you investing in the future. But what about your nextgen members? We've got you covered! Pocketnest has a DIY, step-by-step approach that millennials and Gen Xers crave and, frankly, expect.

Your members get comprehensive financial planning and an enhanced customer experience and you get better member data. **That means more qualified leads, more cross-sell opportunities, bigger client capacity, and higher revenue—just less time spent seeking it.**



POCKETNEST

Financial Planning Made Quick, Easy and Accessible

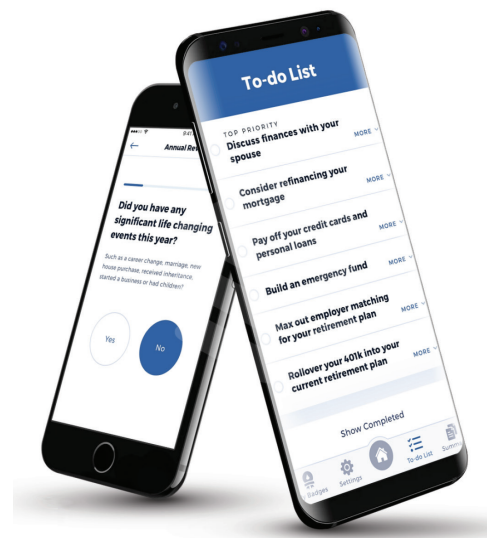
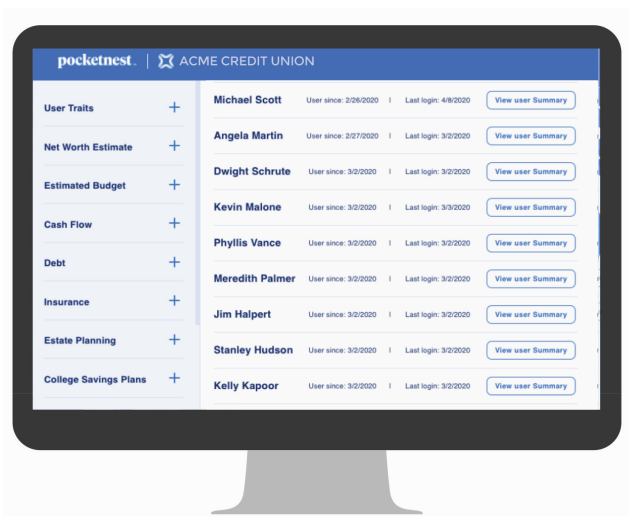
Pocketnest will help you to foster richer, deeper connections with your members—when and how it's right for them. That leaves you with more time to focus on what you do best: customer service.

How does it work? Data-mine the Pocketnest administrative panel featuring priceless member data to uncover quality leads that are ripe for new financial solutions. With one click, you can review a member's complete financial picture: net worth, budget, debt, insurance, investments, retirement, estate planning and how they are saving for their kids' college. From there, determine which of your financial products are right for each member, and when.

Pocketnest, white-labeled in your credit union's brand, can integrate with your members' financial institutions—psst, even those outside of your credit union—to provide them with a complete picture and customized recommendations specific to their financial situation.

Before you ask—Pocketnest takes your members' security seriously. Very seriously. All data transmissions are secured using 256-bit encryption and the app cannot generate any financial transactions. Ever.

Why partner with Pocketnest? You'll uncover more qualified leads, more cross-sell opportunities, bigger client capacity, and higher revenue—all while enhancing the member experience and journey with your credit union.



Pocketnest can help you improve your member experience, all while you grow quality leads. Learn more at [800.262.6285](tel:8002626285) or visiting CUSolutionsGroup.com.