



## FIST FOR CREDIT UNIONS

### Helping your members achieve financial stability

FIST® Score (Financial STability), powered by CalcXML, allows credit unions to better serve members through comprehensive needs assessment, ongoing engagement, and product assistance. After logging into the FIST Score dashboard and answering a few targeted questions, members will receive a high-level view of their financial picture in the four areas of risk: liquidity, longevity, life, and loans.

With interactive dials, the dashboard pinpoints financial gaps and recommends credit union-product solutions, such as savings, retirement, loans, and mortgages to help improve a member's financial health. Through the member-created action plan, email and text alerts, the FIST application assists members to improve their scores until they reach financial stability by achieving a score of 100 in each area.



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## Enhanced Marketing Opportunities

Credit Unions use FIST Score as a database-driven marketing system, which allows access to members' financial information through a personal dashboard. This engagement provides a targeted approach to financial literacy, product placement, and cross-selling opportunities. Plus, credit unions are able to qualify members for specific ad campaigns, seminars, and product placement. The bonus: tracking and measuring member financial improvement. Additional features include:

- Customizable content
- Product integration
- Company colors and logo
- Administrative reports
- Marketing reports
- Targeted email lists
- Single sign-on capability
- Secure and scalable cloud solution



## Prioritize Members' Financial Needs

FIST Score is a wellness index that assists members in identifying and assessing any area of financial weakness. A personal financial dashboard enables members to utilize peer comparisons and receive online education, while using tailored credit union product solutions and other financial recommendations. The result: long-term financial health and success via a detailed action plan, including videos and email task reminders.

## FIST Score Features

- Personalized dashboard
- National/Group comparables
- PDF individualized action plan
- Goal setting and monitoring
- Task list and email reminders
- AI personalized videos
- Advanced planning tools



For more information about FIST, call **800-262-6285** or email at **[info@CUSG.com](mailto:info@CUSG.com)**.