



CONNECTIONS NEWSLETTER

WINTER 2024

PRESIDENT'S MESSAGE

Dear Valued Clients,

Welcome to the Winter 2024 edition of our Connections newsletter. I hope you and your families had a joyful holiday season and great start to the new year. We have just completed another successful year at Wescom Resources Group, and I'm excited to share our latest accomplishments with you.

WRG is proud to welcome three new UNITRI KeyStone core hosting clients: Four Points Federal Credit Union, Memorial Credit Union, and APL Federal Credit Union. We are also excited to welcome two new Tellerly branch automation clients to the WRG family, Knoxville TVA Employees Credit Union and North Star Community Credit Union.

WRG ended 2023 with our best year since our divestment of the Symmetry digital banking suite in 2019. Looking forward to the year ahead, we continue to invest heavily in growing our team and infrastructure. 2024 will be dominated by several large projects, including the planned migration and conversion of some KeyStone processing clients to the Red Hat Linux/X86 platforms, an SD-WAN migration for our client connections, and new network firewalls from Palo Alto Networks

I wish to express my personal gratitude and appreciation for Mark Monsees, who has elected to take early retirement to focus on a small business venture and a charitable ministry project. Mark first joined WRG in 2014, and has been a valued member of the team for much of the past decade, during which time he was instrumental in building the business and developing our internal team. His innovation – combined with his enduring humility and kindness – has helped shape our culture, both as a service provider and business partner.

Mark, thank you for your unwavering support of WRG's mission, and personally, for all your help and guidance during your tenure. Congratulations on this exciting next step in your journey!

In this edition, we share further details covering all this news and more, including a peek behind the scenes into one of Wescom's four Employee Resource Groups, the Outdoor Recreation ERG, as well as our upcoming industry conference appearances.

As always, at WRG our focus remains on serving our credit union clients, who are at the center of everything we do. With your ongoing loyalty and support, we look forward to continuing our legacy of innovation and service to the credit union movement. Thank you for your business!



Sincerely,

Dave Cerwinski

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PRODUCT SPOTLIGHT

WRG INVESTS IN NETWORK FIREWALL UPGRADE WITH PALO ALTO NETWORKS



WRG is excited to announce a major investment in network firewall security with Palo Alto Networks, one of the world's leading providers of cybersecurity solutions. This large multi-year investment is part of our CUSO's ongoing commitment to enhancing the services we provide our clients.

"Palo Alto Networks' firewalls are known for their advanced application-layer (Layer 7) inspection capabilities," says Kamran Yanaghi, Network and Communications Architecture Manager at Wescom. "They can identify and control applications and users, allowing for more granular control over network traffic."

Palo Alto provides superior visibility and control of applications running on the network. It also integrates threat prevention features like antivirus, anti-spyware, and URL filtering into a single platform, using a signature-based approach along with behavioral analysis. Palo Alto's management interface is often praised for its user-friendly design and ease of use.

This investment reinforces WRG's commitment to continuously evaluating our security posture to ensure it is up to date and meeting the demands of an ever-changing fraud and cybersecurity landscape.

The implementation of Palo Alto Networks firewalls is scheduled for completion in five months, but the specific timing of migrating existing users to the new network will depend on the client's requirements.

WELCOME NEW CLIENTS



Knoxville, TN
\$4.2 Billion
273,012 Members



Maddock, ND
\$468 Million
22,897 Members



Laurel, MD
\$620 Million
29,967 Members



Omaha, NE
\$187 Million
8,036 Members



Houston, TX
\$94 Million
10,539 Members

EMPLOYEE SPOTLIGHT

MARK MONSEES, DIRECTOR OF PRODUCTS AND ADMINISTRATION

Ed. Note: Mark Monsees has been a valued member of the WRG team for the better part of the past decade, serving primarily in product and vendor management, operations, and team leadership roles. He recently decided to retire early to pursue other entrepreneurial and mission-based passions. In this edition, we honor Mark's exemplary service with a Q&A covering his career at WRG.



Q: Can you share a bit about your career journey? How have your roles and responsibilities changed over the years?

MM: I started my career in the credit union world back in 1999, following time spent in youth ministry. I began in operations, and quickly became an "Operations Specialist and Administrative Assistant" to the VP of Operations. From there, I oversaw a department responsible for the critical applications and vendors that are the backbone of a credit union. In between my stints at WRG, I spent time as a project manager and as a consultant focused on core conversions.

Q: How would you describe your most recent role and responsibilities?

MM: My current job title is Director of Products and Administration. As such, I oversee our two main product lines – Tellergy and UNITRI Managed Services (hosting for core and other systems). I also support Accounting, Vendor Management, and some other areas.

Q: What have you enjoyed most about working at WRG?

MM: As part of a small organization that is part of larger organization, it really is the best of both worlds. WRG is small enough that we all wear multiple hats and do many things. This means that one day can be completely different from the next. But at the same time we have the resources of a larger organization – whether it's a legal question or a networking question, we have resources at Wescom available and eager to assist.

Q: What is your proudest accomplishment during your time at WRG?

MM: That is a tough one – as everything really was a team effort. But one of our most significant accomplishments was integrating Tellergy to work with KeyStone. This included a lot of collaboration with both the Wescom development and Corelation staff – and the results have been outstanding.

Q: What will you remember most about your time at WRG?

MM: Definitely the people. I have enjoyed my career in credit unions, as we are all focused on helping others succeed. Ultimately, we exist to help our members – and at WRG that includes the members of the 90 or so credit unions we serve. The WRG staff exemplifies this service mindset and they were a pleasure to work with!

Q: Does any particular moment from your time at WRG stand out to you?

MM: On my desk is a Jack Sparrow "Pirates of the Caribbean" clock that has been part of a white elephant gift exchange at WRG for a few years. Somehow I keep ending up as its owner even after giving it away... it just keeps coming back to me! Perhaps my retirement is the perfect opportunity for it to find a new "permanent" owner.



Q: What advice would you share with WRG's staff and clients?

MM: Advice? I am not wise enough to give any advice! I can share my favorite quote – my version of it is "There is a better way to do anything, find it!" attributed to Thomas Edison. We can always improve, especially ourselves—it might just take some work.

SEE YOU AT THE CONFERENCE!

Spring conference season will be here soon, and WRG is on the road again. You can catch us at these upcoming industry events. Please stop by our booth and say hello!

SymCentral 2024 Annual Users Group Conference
March 18-20 | Minneapolis, MN

Trellance EDGE Conference
May 6-7 | Nashville, TN

Corelation 13th Annual Hybrid Client Conference
May 28-30 | San Diego, CA

A PEEK INSIDE WRG

OUTDOOR RECREATION EMPLOYEE RESOURCE GROUP

In 2023, Wescom Credit Union employees formed four Employee Resource Groups (ERGs) to support the values of personal and professional growth. These ERGs provide Wescom and WRG team members with a forum to build closer bonds outside of work, which in turn helps to enhance team engagement as well as their extra-work lives.

One of these groups is the Outdoor Recreation ERG, which is actively supported by several WRG team members. The Outdoor Recreation ERG offers team members the opportunity to participate in recreational activities like golf outings, soccer scrimmages, and local hikes.

In Spring 2024, the Outdoor Recreation ERG will expand its impact within the community by working with the Wescom Foundation to support local charitable organizations during its events and activities.

