



## Our Core Values



### CLIENT FOCUS

Act as an extension of our clients' teams, defining their priorities and opportunities as our own.



### TEAMWORK & COLLABORATION

Trust in the transformative power of collaboration with clients and partners to create lasting, high-value solutions. Share in celebrating our clients' success.



### EXCELLENCE

Take personal pride in every aspect of work, and do it in a way that leaves an enduring mark of excellence.



### INTEGRITY

Form lasting relationships built on honesty and trust, by honoring and delivering on commitments.



### INNOVATION

The best results are achieved by continually challenging the status quo and seeking to innovate in small ways or large.

## President's Message

Dear Valued Clients,

Welcome to the Fall edition of our newsletter. I hope that you and your teams have remained healthy and well.

In early September, we brought two additional credit unions live on our Unitri Managed Services platform for KeyStone. Congratulations to Deanne Schriener and the team at Trius FCU. Congratulations also to Lora Benrud, Michael Tomaszek, and their team at WESTconsin FCU. Both credit unions completed their core conversion to KeyStone, along with a migration to WRG's Managed Services.

With our continued increase in client deployments, I'm pleased to report that this quarter we're making new large investments in systems and people to serve you better. And with our 2022 business plan nearing its completion and approval, there's even more on tap for 2022.

I'd love to write about details here, but I'd love even more if I could tell you about them. I'd also love to get your input and direction on what services are of the greatest priority to you, so that we can make smart decisions here about what to focus on. To that end, in the next few weeks I'll reach out to each of you to check on your availability for a virtual meeting in November.

Of course, if you'd like to reach me before I contact you, I'm always available at [dcerwinski@wescom.org](mailto:dcerwinski@wescom.org) and (714) 254-5302. Thank you for your continued support and partnership.



All the best,

**Dave Cerwinski**

President, Wescom Resources Group

## Welcome New Clients



## BayPort CU Solves Data Security Concerns with Tellerly

Our latest case study focuses on BayPort Credit Union's decision to implement the Tellerly platform in its branches, and discovering new efficiencies while upgrading the member experience.



[READ MORE >>](#)



**Employee Spotlight:**  
**MARTIN PHAM | Software Implementation Analyst II**

Martin brings a breadth of experience to our team that specializes in software troubleshooting, integration, and development. In his role, Martin serves credit unions to deploy Tellerly solutions that synergize their daily branch operations and behind the scenes, Martin is tapped to execute process improvements that benefit both our clients and internal teams.

Martin collaborates with our Product Manager to develop and engineer new features for Tellerly. After the initial design, Martin contributes to the development phase and is grateful to be part of a feature set that enriches the Teller-Member experience.

At WRG, Martin enjoys learning from our experienced staff and client engagements. Through our core values of excellence and innovation, Martin embraces new opportunities and expands his responsibilities within the team. He sends a warm thank you to our team members and clients who have encouraged him along the way.

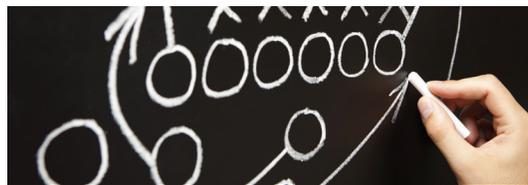


**7 Credit Union Branch Upgrades for Your Retail Strategy and Budget**

Phrases like 'the new normal' and 'Zoom fatigue' are some of the hottest since COVID-19 hit the U.S. Another: 'The branch is dead. Long live the branch!'

Branches have changed and will continue to evolve, but members – regardless of age – will always need them for more consultative financial services.

[READ MORE >>](#)



**Credit Unions' Best Defense is a Good Offense**

Credit union business continuity and disaster recovery planning takes time, effort and money – resources credit unions are short on these days.

But it's not just credit unions. A recent article from Security Magazine reported that just 54% – barely half – of companies have plans in place. That's a dangerous proposition for any company, but especially financial institutions and particularly credit unions, which have worked for a century to earn members' long-term trust.

[READ MORE >>](#)



**Technology is the Future of Credit Union Branches**

Credit union branches were among the many business outlets forced to close their doors to the public during the COVID-19 pandemic, but now branches are opening back up again!

After a year of primarily digital banking, how can credit unions keep their branches relevant?

[READ MORE >>](#)



**Symitar Educational Conference 2021**

We hope to see you at SEC 2021 on October 11th-14th. This year's conference will be held virtually and combined with the Jack Henry Annual Conference. Make sure to stop by the booth to say "hello" and learn more about our solutions for your Symitar core system.

We sincerely value your business and thank you for your continued support and collaboration! –*Team WRG*



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 Director of Sales & Marketing



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