

Strategic Planning

Our comprehensive strategic planning process analyzes your current market position, targets your short- and long-term objectives, and identifies and recommends the necessary strategies you'll need to achieve your goals. The MP Strategic Plan process includes:

- Reviewing Past and Current Marketing Efforts
- Incorporating CRM/MCIF Data Analysis (when available)
- Integrating Membership Demographic Base Analysis
- Integrating Member Survey Analysis (when available)
- Comparing Product/Service Market Shares
- Identifying Product/Service Opportunities
- Targeting Credit Union Goals
- Identifying Product/Service and Merchandising Strategies
- Recommending Sales and Service Tactics

We can use your existing research and your member and product/service data, or provide the necessary research tools, including member and non-member surveys, focus groups, product and service surveys, loyalty and satisfaction research, and in-person, online and e-mail polling.

Call to learn more about how you can get more done and maximize your marketing investment with a comprehensive strategic plan.

1-888-641-1215

Online: www.marketingpartners.com



MarketingPartners
Bridging The Marketing Gap

Return to Top of Report		View March 2005 Report		View Data Summary & Reports		End of Reports	
LOAN INFORMATION							
Credit Union Name: June 2005 Federal Charter/Certificate Number: 19328							
ALL DELINQUENT LOANS (INCLUDING CREDIT CARDS) AND LEASES AS OF June 30, 2005							
	Number	Acct. Code	Amount	Acct. Code	Amount	Acct. Code	Amount
1. 1 month to less than 2 months delinquent	87	020A	4,560,625	020D	0	0	0
2. 2 to less than 6 months delinquent	104	021A	876,165	021B	0	0	0
3. 6 to less than 12 months delinquent	17	022A	172,895	022B	0	0	0
4. 12 months and over delinquent	2	023A	27,063	023B	0	0	0
TOTAL DELINQUENT (7YD OR MORE MONTHS)	123	041A	1,674,823	041B	0	0	0
DELINQUENT CREDIT CARD LOANS AS OF June 30, 2005							
	Number	Acct. Code	Amount	Acct. Code	Amount	Acct. Code	Amount
5. 1 month to less than 2 months delinquent	0	026A	0	026B	0	0	0
6. 2 to less than 6 months delinquent	0	027A	0	027B	0	0	0
7. 6 to less than 12 months delinquent	0	027A	0	027B	0	0	0
8. 12 months and over delinquent	0	045A	0	045B	0	0	0
TOTAL DELINQUENT (7YD OR MORE MONTHS)	0	045A	0	045B	0	0	0
MISCELLANEOUS LOAN INFORMATION							
	Number	Acct. Code	Amount	Acct. Code	Amount	Acct. Code	Amount
9. Loans Purchased from Other Financial Institutions Year-to-Date	0	014	0	015	0	0	0
10a. Indirect Loans - Point of Sale Arrangement	0	016	0	017	0	0	0
10b. Indirect Loans - Outsourced Lending Relationship	0	018	0	019	0	0	0
10c. TOTAL OUTSTANDING NONRECIT LOANS	0	018	0	019	0	0	0
11. Loans Outstanding to Credit Union Officials and S. Executive Staff	0	020	0	021	0	0	0
12. Loans Granted Year-to-Date	0	022	0	023	0	0	0
13. Total Amount of All Loans Charged Off Year-to-Date	0	024	0	025	0	0	0
14. Total Amount of All Year-to-Date Recoveries on C/I	0	026	0	027	0	0	0
15. Total Amount of Credit Card Loans Charged Off	0	028	0	029	0	0	0
16. Total Amount of Year-to-Date Recoveries on Credit	0	030	0	031	0	0	0
17. Total Amount of All Loans Charged Off due to Bank and Chapter 13 Bankruptcy Loan Charge-Offs	0	032	0	033	0	0	0
18. Number of members with loans in your credit union	0	034	0	035	0	0	0
a. Chapter 7 Bankruptcy Year-to-Date	0	036	0	037	0	0	0
b. Chapter 13 Bankruptcy Year-to-Date	0	038	0	039	0	0	0

Return to Top of Report		View March 2005 Report		View Data Summary & Reports		End of Reports	
INCOME AND EXPENSE							
Credit Union Name: June 2005 Federal Charter/Certificate Number: 19328							
This page must be completed by all credit unions.							
INTEREST INCOME: January 1, 2005 TO June 30, 2005							
	Amount	Acct. Code	Amount	Acct. Code	Amount	Acct. Code	Amount
1. Interest on Loans (Gross before interest returns)	1,944,923	110	(0)	119	0	120	0
2. (Less) Interest Refunded	384,411	120	384,411	121	0	122	0
3. Income from investments (including interest and dividends)	2,330,334	115	0	116	0	117	0
4. Trading Profits and Losses (Realized and Unrealized)	118,000	300	0	301	0	302	0
TOTAL INTEREST INCOME (Sum of Items 1-4)	4,487,268	300	384,411	301	0	302	0
INTEREST EXPENSE: January 1, 2005 TO June 30, 2005							
	Amount	Acct. Code	Amount	Acct. Code	Amount	Acct. Code	Amount
5. Dividends on Deposits (Include dividends earned during current period)	497,166	360	0	361	0	362	0
6. Interest on Borrowed Money	497,166	360	0	361	0	362	0
7. TOTAL INTEREST EXPENSE (Sum of Items 5-6)	994,332	360	0	361	0	362	0
8. Provision for Loan & Lease Losses	118,000	300	0	301	0	302	0
9. LOSS FROM OTHER OPERATIONS (Sum of Items 7-8)	1,112,332	116	0	117	0	118	0
NET INTEREST INCOME AFTER PROVISION FOR LOAN & LEASE LOSSES (Item 5 less Item 9 less Item 10)	3,374,936	116	384,411	117	0	118	0
NON-INTEREST INCOME: January 1, 2005 TO June 30, 2005							
	Amount	Acct. Code	Amount	Acct. Code	Amount	Acct. Code	Amount
10. Fee Income	124,695	059	0	060	0	061	0
11. Other Operating Income (include unconsolidated CUSO Income)	420	420	0	421	0	422	0
12. Other Operating Income (include unconsolidated CUSO Income) - Trading Securities	420	420	0	421	0	422	0
TOTAL NON-INTEREST INCOME	125,115	059	0	060	0	061	0
TOTAL INCOME	3,500,051	116	384,411	117	0	118	0

Return to Top of Report		View March 2005 Report		View Data Summary & Reports		End of Reports	
STATEMENT OF FINANCIAL CONDITION AS OF June 30, 2005							
Credit Union Name: June 2005 Federal Charter/Certificate Number: 19328							
This page must be completed by all credit unions.							
ASSETS							
	Amount	Acct. Code	Amount	Acct. Code	Amount	Acct. Code	Amount
Cash for data collection purposes, amounts reported for items 2 and 3 will be included on Schedule C-	2,482,423	730A	0	730B	0	730C	0
Investments, Cash on Deposit and Cash Equivalents on Schedule C-	312,568	671A	0	671B	0	671C	0
1. Cash on Hand (Coin and Currency)	0	730A	0	730B	0	730C	0
2. Cash on Deposit (Amounts Deposited in Financial Institutions)	312,568	671A	0	671B	0	671C	0
a. Cash on Deposit in Corporate Credit Unions	8,401,684	7301	0	7302	0	7303	0
b. Cash on Deposit in Other Financial Institutions	0	7302	0	7303	0	7304	0
c. Total Cash on Deposit (Amounts Deposited in Financial Institutions)	8,401,684	7301	0	7302	0	7303	0
3. Cash Equivalents (Investments with Original Maturities of Three Months or Less)	0	730C	0	730D	0	730E	0
4. Trading Securities	0	805	0	806	0	807	0
5. Available for Sale Securities	0	808	0	809	0	810	0
6. Held-to-Maturity Securities	0	811	0	812	0	813	0
7. Deposits in Commercial Banks, S&Ls, Savings Bank	0	814	0	815	0	816	0
8. Memberships Capital at Corporate Credit Unions	0	817	0	818	0	819	0
9. Paid-in Capital at Corporate Credit Unions	0	820	0	821	0	822	0
10. All Other Investments in Corporate Credit Unions	0	823	0	824	0	825	0
11. All Other Investments	0	826	0	827	0	828	0
12. TOTAL INVESTMENTS (Sum of Items 4-11)	0	826	0	827	0	828	0
LOANS HELD FOR SALE: See Instructions.							
13. Loans Held for Sale	0	829	0	830	0	831	0