



70 

or more trips across the state were made to visit with credit unions in 2024. These helped us connect over common challenges, opportunities, and left-handedness.

 **over 100**

personal finance and board resource blogs were published, providing relevant and timely information in bite-sized pieces.



Our **17** communities learned (and usually laughed) together during **550+** hours of community meetings.

✦ **IN 2025**

We're looking forward to expanding on the success and momentum of our **Advocacy Champions** and **Fraud Communities**. [Learn more.](#)

ENGAGEMENT SURVEY

In Q2, we surveyed **466** credit union employees to find out how **important** the work we do was to them, how **satisfied** they were with the work MCU is doing, and how **engaged** they are with MCU programs, services, and staff.

78%

told us our work was "important" or "very important"

70%

rated themselves "satisfied" or "very satisfied" with MCU's work

75%

said they regularly engaged with MCU

76%

indicated they feel "comfortable" or "very comfortable" contacting staff

When we work together, everyone wins!

\$30,754 was raised for MCUCD

Six graduated from the 2024 FiCEP program **968** accounts have saved **\$790,647** through the WINcentive program

\$30,139 was donated to Shodair Children's Hospital through CU4Kids — a record-setting year!

Advocacy in action!

MCU secured a contract with the **Taylor Luther Group** for lobbying efforts, while the **Be Wild Conference** emphasized the crucial role of advocacy in promoting credit unions. Additionally, PAC fundraising efforts resulted in **\$14,486** for MT CUAC and **\$16,625** for America's Credit Unions PAC.



We shared over **50** Credit Union Difference stories with over **3,275** followers across **five** social media platforms and our newsletter.

"There is no doubt that every credit union in Montana has numerous examples of outstanding community support, and MCU has a terrific platform to highlight these efforts. **In sharing our own stories, each one of us can inspire and encourage each other and really push this movement forward.** We always appreciate the chance to see what everyone else is doing to positively impact their communities."

~Josh Kroll, VP Marketing, Park Side CU

78 professionals completed one of six Personify Leadership® trainings — PLUS 37 participated in **two** custom sessions.

In **2025**, we're introducing Experiential Facilitation and Deep Dive!

"Montana's Credit Unions is my "go-to" for **education, conferences, compliance, advocacy, vendors, and networking opportunities.**

I trust MCU's stellar staff to **help my team and me reach our goals.**"

~Darci Parsons, President/CEO, Ravalli County CU

42

thought leaders helped in-person event attendees learn

53+

networking hours were spent with peers and our problem-solving partners

✦ **IN 2025**

Did you take advantage of our partnership with the Tennessee League for discounted virtual IRA Training? Look for more in 2025.



RISK MANAGEMENT

Our compliance hotline received over **550** contacts. **19** training presentations were presented to **13** credit unions. We distributed **12** Compliance Vault newsletters to **200+** people and sent **13** BSA/OFAC emails to **325** people across the state.

We also hosted a webinar meet and greet with TruStage CEO Terrance Williams.

✦ **IN 2025**

We're looking forward to:

- HR Suite Plus product (for our <\$150m CUs)
- InfoSight360 product and electronic lien filing

MCUL GROUP BENEFITS TRUST

In 2024, the MCUL Group Benefit Trust helped members **manage their health and financial costs** through:

- **Five** unique health plans, **two** dental and vision options, **three** group life options and STD, LTD, and voluntary products of Life, Accident, Critical Illness, and Hospital Indemnity protections
- **\$265,000** in saved prescription costs
- **Free** Biometric Screenings at **33** sites across Montana
- **Free** mental health support
- **Free** telemedicine, remote, physical therapy, and health coaching
- **Free** access to Cancer Expert to ask about screenings, new or existing diagnosis, procedures and surgeries, and more
- **Free** access to advocates for employees approaching retirement to understand Medicare and Social Security

✦ **IN 2025**

The Trust conducted an **extensive RFP process** and reviewed seven potential vendors to find a new third-party claims administrator who would help **grow the Trust** with a national provider network partner.



We offered **FREE** member education through **52** unique Trust Tip emails, open enrollment education, and our MCUL Trust website.

Once again, our annual **Collaboration in Wellness Conference** was wildly successful.

"Our health insurance trust is so much more than just medical insurance. We have a dedicated team that is trying to take care of our 'whole' lives and not just treat symptoms and give us a pill to take."
~one event attendee