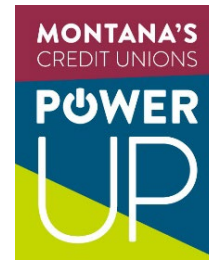


Montana's Credit Unions Ignite the Future!



Montana's Credit Unions is an association that exists to promote and enhance a thriving credit union community. Its three entities support this mission. The Montana Credit Union League provides dues-supported services to protect, advocate, and inform. League Service Group provides quality business services for Montana's credit unions. And Montana Credit Unions for Community Development acts as a catalyst to implement programs through Montana credit unions that improve the social and economic well-being of Montana consumers.

Gerry Singleton, President/CEO, 406.324.7203, gerry@mcun.coop



Take control of the health insurance you offer your employees by joining the **Montana Credit Union League Group Benefit Trust**. League affiliates in Montana are eligible to become owners/users of the Group Benefit Trust which offers multiple health insurance plans to meet your needs (medical, dental, vision) as well as an award-winning Healthy You! wellness program and ancillary benefits of life and AD&D, long-term and short-term disability, and voluntary life.

Mara Rayner, Director of Human Resource Benefits, 406.324.7455, mara@mcun.coop

MCU Associate Member



Millennium Corporate Credit Union is a wholesale credit union providing financial services to credit unions throughout the Midwest. We've been serving credit union members for over 70 years and work with 250 credit unions in eleven states with the home office in Wichita, KS.

Haley DaVee, President/CEO, haleyd@millenniumcorporate.org

Bob Jewett, Dir. of Mktg. & Member Engagement, robert@millenniumcorporate.org

Garrett Glidewell, Member Engagement Rep., garrett@millenniumcorporate.org



Since 1992, the **Asset & Investment Management Service (AIM)** has consulted with credit unions of all asset sizes, providing sound, practical and impartial financial advice. With AIM, you can join a trusted partner who will help manage your assets and meet your targets. AIM offers a variety of products and services to assist credit unions with ALM, liquidity, investing, and other related issues.

Tanner Goertzen, Sr. Financial Analyst, tanner@aimcusolutions.org

Ian Trebilcock, Financial Analyst, ian@aimcusolutions.org

Cory Gleason, Financial Analyst, cory@aimcusolutions.org

LSG Strategic Partners & VIPs



American Share provides an alternative to federal deposit insurance. We cover up to \$250,000 per account – not per member – with no limit to the number of accounts that can be insured. Unlike NCUA, American Share's sole purpose is to insure consumer funds without adding another layer of regulatory burden.

Don Gensler, Sales Manager, dgensler@americanshare.com
Jozann Borenstein, AVP Sales, jborenstein@americanshare.com



Bases Covered Auditing (BCA) is an audit firm that specializes in Credit Union compliance. We are a locally owned Credit Union Service Organization in Sioux Falls, SD. Our team is knowledgeable and are experts in Internal Audit, Compliance, and Risk Management.

Eric Lundin, President/CEO, eric@basescoveredauditing.com
Danielle Adam, Compliance Professional, danielle@basescoveredauditing.com



CU DigiLend helps credit unions offer point-of-sale financing through local business partnerships, making it easy for members to access financing when they need it most, while growing loan portfolios and supporting the local economy. It's a simple, white-labeled solution built for credit unions and their communities.

Matt Oakley, Chief Operating Officer, matt.oakley@affiliatesmgt.com



CUMONT provides real estate loan services for Montana credit unions. They believe that by working together, they can improve lives and grow communities and help your credit union thrive. An effective real estate loan processing solution allows you to do what you do best – serve your members' needs and build loyalty.

Chandra Thronson, Manager, chandrat@cu-mont.com



DCI Credit Services partners with thousands of businesses across the Midwest to deliver exceptional debt collection results. Their success is driven by cutting-edge technology and a commitment to legal compliance. The most up-to-date software and data analytics allow DCI to process large volumes of information rapidly and deliver collection rates 4-5 times the national industry average.

Tom Kloster, Sales Executive, tomkloster@dcicredit.com



First Call is a trusted technology partner dedicated to helping credit unions and community-focused financial institutions operate securely, efficiently, and with confidence. Guided by our philosophy, *what matters most, first*, we align every solution with the priorities that drive your organization forward.

With over two decades of experience, First Call delivers a comprehensive suite of services spanning IT, Security & Compliance, AI, and Digital Marketing; all tailored to the unique regulatory and operational demands of the financial industry.

Robin Lloyd, CIO for Credit Unions, rlloyd@firstsolution.com
Chris Sellers, VP of Security, csellers@firstsolution.com



First Class Mortgage knows that building relationships makes for satisfied customers. When you send members to First Class Mortgage, their team represents you, and their focus is your borrowers' interests, whether they're refinancing or purchasing their first home. For information on their process and loan programs, call Dan.

Dan Van Winkle, President, dan@firstclasscorp.com



Leavitt Great West Insurance Services is an independent insurance agency with offices in Billings, Bozeman, Butte, Choteau, Conrad, Cut Bank, Great Falls, Helena, Kalispell, Livingston, and Shelby. Our independence means we represent multiple insurance companies and are able to match our clients' needs with the insurance company, product, or risk management strategy that will result in the right insurance coverage at an extremely competitive premium rate. Our independent status means better insurance for individuals, families, and businesses—from home and car insurance to workers compensation to property risks to liability insurance and more.

Dara Anderson, Team Lead, 406.465.8724, dara-anderson@leavitt.com



A full-service digital marketing agency, **PRIME's** small but mighty team, based in Bozeman, has partnered with credit unions for over a decade. In an industry of one-size-fits-all marketing, they replace generic approaches with targeted strategies that drive membership, engage younger audiences, and increase operational efficiency, delivering measurable, meaningful results.

Jason Johnson, Founder/President, jason@primebzn.com
Gregg Alexander, Founder/COO, gregg@primebzn.com



ScreenSteps is the world's first AI-powered Knowledge Operations Platform, designed to empower credit unions to quickly capture, share, and manage complex procedures with frontline employees. The results? Fewer questions and mistakes, and a more consistent member experience.

David Buttars, Enterprise Account Executive, david@screensteps.com
Rebekah Larson, Firefly Consulting CEO, rlarson@fireflyconsultingllc.com



Trellance Cooperative Holdings, Inc. is a credit union cooperative and leading technology partner for credit unions. Its companies – Rise Analytics, ProBridge and Optiri – provide technology solutions for credit unions. Trellance’s mission is to make sure credit unions have access to the tools and resources they need. Learn more at [Trellance.com](https://www.trellance.com).

Alex Grimm, Sr. National Sales Executive, sgrimm@trellance.com



TruStage® is a financially strong insurance and financial services provider, built on the philosophy of people helping people. We believe a brighter financial future should be accessible to everyone, and our products and solutions help people confidently make financial decisions that work for them at every stage of life. www.trustage.com.

Randy King, VP Sales, randall.king@trustage.com

Lisa Simons, Account Executive, lisa.simons@trustage.com



Velera, formerly PSCU/Co-op Solutions, is the nation’s premier payments credit union service organization (CUSO) and an integrated financial technology solutions provider. With over four decades of industry experience and a commitment to service excellence and innovation, the company serves more than 4,000 financial institutions throughout North America, operating with velocity to help its clients keep pace with the rapid momentum of change and fuel growth in the new era of financial services. Velera leverages its expertise and resources on behalf of credit unions and their members, offering an end-to-end product portfolio that includes payment processing, fraud and risk management, data and analytics, digital banking, instant payments, strategic consulting, collections, ATM and POS networks, shared branching and 24/7/365-member support via its contact centers.

Rebecca Burns, Client Growth Executive II, Rebecca.burns@velera.com

Exhibitors



ADVANTAGE delivers multiple profit centers within one platform: strategic overdraft management, data-driven account acquisition, vendor contract optimization, and compliant account holder communications. Our solutions combine deep industry expertise, powerful data intelligence, and automation to drive revenue growth, operational efficiency, and long-term competitive strength.

Shiela Finley, Reginal Director, shiela.finley@jmfa.com



Akitra's AI-powered platform offers comprehensive, automated compliance readiness for frameworks like SOC 2, ISO 27001, HIPAA, and GDPR, accelerating certification. We provide continuous monitoring, automated user access reviews for identity management, and advanced penetration testing - including AI-powered and manual options - to identify vulnerabilities.

Clint Romney, GRC Manager, clint@akitra.com



Allied Solutions is one of the largest providers of insurance, lending, risk management, and data-driven solutions to financial institutions in North America. Allied Solutions uses technology-based solutions customized to meet the needs of over 6,000 banks, credit unions, finance companies, mortgage servicers, and auto dealers.

Sherry Deeds, Reginal Vice President, sherry.deeds@alliedsolutions.net

Melanie McNamara, Account Executive, melanie.mcnamara@alliedsolutions.net

Heidi Tinsley, Account Executive, heidi.tinsley@alliedsolutions.net



Credit Mountain is a CUSO Fintech transforming the credit monitoring and loan denial process to provide more transparency, automation and a path for borrowers to achieve their financial goals with your institution. With a white-labeled, digital Adverse Action Notice and a warm invitation to a credit coaching program, we offer your members and borrowers real financial wellness and bespoke guidance to improve their credit quality. We monitor credit progress, and send bi-directional signals to you and your member, with an intelligent and timely match to the right loan.

Our Credit Monitoring solution includes the intelligence of an AI Credit Coach trained to guide members as a financial counselor and an underwriter, while looking for the right loan to help them reach their next financial milestone.

Matt Smith, Head of Sales, matt.smith@creditmountain.co



CU*NorthWest is a cooperative CUSO supporting credit unions with core technology, shared services, and strategic expertise. We connect people, systems, and ideas to help credit unions operate more effectively, grow intentionally, and better serve their members through collaboration and innovation.

Megan Pieper, Sales Executive, megan.pieper@cu-northwest.com

Ember Craig, Client Services Manager, ember.craig@cu-northwest.com



Cushing Terrell was founded in 1938 by a pair of architects. Ralph Cushing and Everett Terrell acted on the belief that integrating architecture, engineering, and design opened doors for deepened relationships and enhanced creativity: the beginnings of our design practice and what still defines us today. Driven by empathy, our team works together to design systems and spaces that help people live their best lives, achieve their visions, and enjoy healthy, sustainable built environments. For more information about Cushing Terrell and our mission to forever improve, visit cushingterrell.com or call 406.248.7455.

Audrey Handelman, Sr. Project Mrg. | Architect, audreyhandelman@cushingterrell.com
Mallory Mashek, Architect | Associate, mallorymashek@cushingterrell.com



We believe business is more than the next deal; it's a partnership. Choose **ESP**, and we become a partner in your success. We offer both a packaged solution set for credit unions that prefer full core oversight and an open framework of over 75 vendors for those seeking the ultimate in customization.

Casey Boyer, Brand Ambassador, cboyer@espsolution.net



FALKIN gives credit unions a complete member-facing safety system that prevents member financial loss, reduces operational burden, and builds genuine brand differentiation by putting safety first. Because your members deserve to keep their money safe from scams.

Joel Frisch, COO, joel@falkin.com



The **Federal Home Loan Bank of Des Moines** is a member-owned cooperative that provides funding solutions and liquidity to nearly 1,200 financial institutions to support mortgage lending, economic development, and affordable housing in their communities. Serving 13 states and three U.S. Pacific territories.

Eric Jensen, Senior Relationship Manager, ejensen@fhlbdm.com



Ferrin & Company, LLC is a specialized CPA firm providing credit union audit and consulting services. Credit unions are the industry we serve. Though our professionals have experience auditing other industries, we have chosen to focus our firms efforts in providing professional audit and consulting services to the credit union industry. In addition to your annual audit, we can meet all your credit union's other audit needs, including employee benefit plan and retirement plan audits, bank secrecy act validations and ACH Audits. Our audit service professionals are committed to your credit union's success. Our audit services reflect that passion.

Bart Ferrin, Owner/Shareholder, ferrinpcpa@ferrinpcpa.com
Christopher Ferrin, Audit Manager, critter@gmail.com



FLEX delivers flexible, robust core processing built for credit unions. Our suite includes online and mobile banking, lending with eSignatures, and automated decisioning tools. With open APIs and customizable tech stacks, we enable seamless partner integrations — empowering credit unions to enhance the member experience and drive growth.

Joe Shelby, Regional Territory Manager, joe.shelby@flexcutech.com



Gallagher's Executive Benefits team helps credit unions secure their future through leadership continuity and aligning executive performance with strategic goals. We specialize in nonqualified benefit plans, such as split dollar and 457(f) plans, to retain and incentivize key leaders. Gallagher produces an annual Executive Compensation and Benefits Survey to help credit unions benchmark their offering.

Jeremy DeBruin, Senior Area Vice President, jeremy_debruin@ajg.com

BJ Burt, Area Vice President, bj_burt@ajg.com



Grizzly Security is the largest CIT and Cash Vault Services provider in the state of Montana. Our transportation network established over 45 years ago, along with our industry leading tracking and currency processing software, delivers our customers piece of mind through cash visibility and timely service.”

Erik Ewing, Chief Development Officer, eewing@grizzlysecurity.com

Kandem Services Group, LLC

Kandem is a strategic business advisory and consulting firm that helps business owners increase company value, improve transferability, and prepare for successful exits. Through advisory services, training, and exit planning, Kandem transforms successful businesses into more valuable, scalable, and sale-ready organizations.

Michael Sauer, Strategic Business Attorney, michael@kandem.com

Tom McElwrath, Strategic Business Advisor, tom@tandemacq.com



OpenEye delivers intelligent cloud video technology to help people live, work, and learn. Combining powerful cloud-managed video with AI-based video analytics, OpenEye Web Services (OWS) uncovers insights that enhance security and increase revenue. Secure and scale smart environments with an open, intelligent, and trusted cloud video platform.

Ryan Loft, Senior Sales Engineer, rloft@openeye.net

ORIGENCE

Origence is a leading technology provider transforming the lending experience for credit unions and their members. Established in 1994 as a credit union service organization, Origence has helped credit unions originate nearly \$600 billion in loans through a network of connected technology solutions including Origence CUDL™, Origence Lending Services, Origence arc, and FI Connect. Learn more at www.origence.com and follow us on Facebook, X, and LinkedIn.

George Batty, Sales Director, Enterprise Solutions West, George.batty@origence.com



Pinion Technology Core enables credit unions to manage their IT, stay compliant, reduce risk and leverage technology to grow faster and more efficiently. With over 20 years of experience, our security-first approach ensures that your IT infrastructure is robust and compliant with industry standards.

AJ Combs, Solutions Architect, acombs@ptcore.com



Securitas Technology, part of Securitas, is a world-leading provider of integrated security solutions that protect, connect, and optimize businesses of all types and sizes. More than 13,000 colleagues in 40 countries are focused daily on our purpose to help make your world a safer place and our commitment to deliver an unparalleled client experience. With clients at the heart of all we do, our people, knowledge, and technology power our connected ecosystem of health, safety and security solutions and services.

Nicholas Hill, Account Executive, nicholas.hill@securitases.com



As Montana's only Children's Miracle Network Hospital, **Shodair** provides mental health and medical genetic services across the state regardless of a family's ability to pay.

Thanks to partnerships and support like that from Montana's Credit Unions, Shodair is able to meet its mission, "To heal, help, and inspire hope."

Shodair has been part of Montana's history since 1896 and deeply dedicated to serving its citizens. Shodair is currently accepting patients 3 to 18 in need of inpatient acute or residential or outpatient mental health services. To find out more visit shodair.org

Rusty Cash, Chief Development Officer, rcash@shodair.org



Spectrum Business, a division of Charter Communications, provides fiber-based technology solutions for businesses. Services include high-speed internet, Ethernet, voice, and managed network services including cybersecurity and security cameras. With scalable connectivity and dedicated support, Spectrum Business helps organizations enhance productivity, streamline operations, and meet evolving digital demands across industries nationwide.

Brett Kingery, Sales Manager, brett.kingery@charter.com

Kara Ouzts, Enterprise Account Executive, kara.ouzts@charter.com

Tom Weida, Enterprise Account Executive, thomas.weida@charter.com

Rianna Devereux, Enterprise Account Executive, rianna.devereux@charter.com



State National has been helping credit unions mitigate risk since 1973. Our technology-driven, innovative portfolio protection solutions maximize efficiency and ROI while minimizing friction and member noise. Safeguard your credit union's assets against losses from uninsured collateral by partnering with the CPI specialist—State National.

Alan Coursey, Division Vice President, West, acoursey@statenational.com

Josh Malinosky, Regional Vice President, jmalinosky@statenational.com

Steve Schnabel, Sr. Client Executive, sschnabel@statenational.com



Headquartered in San Antonio, **SWBC** is a diversified financial services company providing a wide range of insurance, mortgage, and investment services to financial institutions, businesses, and individuals. With offices across the country, SWBC is committed to providing quality products, outstanding service, and customized solutions in all 50 states. For more information, visit SWBC's website at www.swbc.com.

Jon Calvert, Regional Vice President, jon.calvert@swbc.com

Paige Riggs, Large Market Account Manager, paige.riggs@swbc.com



Sync1 Systems is a loan origination software CUSO empowering credit unions with innovative, AI-driven technology. Our turn-key platform enhances digital experiences, streamlines lending, and adapts to evolving member needs—delivering efficient, flexible, and effortless lending solutions in a rapidly changing financial landscape.

Steve Weber, Regional Sales Manager, stephen.weber@sync1systems.com



Technology Unlimited is a provider of currency, coin, and check handling solutions. Contact us for any interest in cash recyclers, ATMs, ITMs, check scanners, coin sorters, and currency counters. We provide many different manufacturers and models to meet the specific needs of your Credit Union and your individual branches.

Erik Fitterer, Vice President, erikf@tuiusa.com



At **Vision Net**, we believe innovation starts with connection between people, ideas, and communities. From our beginnings in Montana's telecom co-ops to today's statewide network and data centers, our mission has stayed the same: deliver reliable technology that empowers our neighbors to thrive. We value integrity, teamwork, and a shared commitment to the customers who trust us every day.

Morgan Smith, Account Executive, marketing@vision.net

Cassie Kitch, Marketing Specialist, cassie.kitch@vision.net

Matt Fowler, Account Executive, matt.fowler@vision.net



Vitu is the only provider offering end-to-end vehicle lifecycle solutions, including in-state EVR, nationwide title and reg with Vitu Interstate, E-Titling with NTX, digital payoff and title releases with Accelerated Title™ and title lifecycle management with Collateral Management Solutions (CMS). Backed by unmatched support, Vitu streamlines title and registration management across the United States.

Maren King, Account Executive, mking@vitu.com

Haley Manning, Account Executive, haley@vitu.com



VolCorp provides its member credit unions with the tools to succeed, specializing in dynamic payment solutions, tailor-made investment services, and incomparable member care. Solutions include customized consulting, compliance, audit, and risk-based services offered by Symphony LLC, a wholly owned CUSO. For more information about VolCorp, visit www.volcorp.org.

Nate Hicks, Regional Development Executive, nhicks@volcorp.org

Andrew Barr, Senior Account Executive, abarr@volcorp.org