



CHARTER EXPANSIONS AND CONVERSIONS

Value: Symphony's consulting services offer a comprehensive, customizable approach to any charter conversion and membership expansion project. Symphony's team of experienced consultants will work closely with you to ensure a successful strategy alignment, including the necessary due diligence through the application and approval process.

Benefits: Symphony's consultants have firsthand experience working in natural-person credit unions and more than 20 years of combined experience conducting charter conversions and expansions, including more than 50 completed applications and approvals.

Services: Symphony strictly adheres to all state and federal regulatory requirements and processes. These services include all required supporting documentation, as well as business and marketing plans, peer comparisons, demographic research, and the following items:

Pre-Engagement Services:

- » Understand the current field of membership, future direction, and impacts.
- » Develop scenarios under different charter structures or fields of membership.
- » Outline the specific application process for the engagement, including a timeline for submission.
- » Determine any potential financial implications.

Engagement Services:

- » Develop the application and complete all required paperwork.
- » Respond to regulator questions and/or concerns related to the application.
- » Assist with developing business and marketing plans.
- » Establish financial projections.

Post Engagement Services:

- » Complete any additional regulator-required paperwork.
- » Provide post-conversion support and planning (as needed).

Contact us at

info@symphonycuso.org



SYMPHONY
INSTRUMENTS FOR SUCCESS

symphonycuso.org
800-470-3444, Option 8