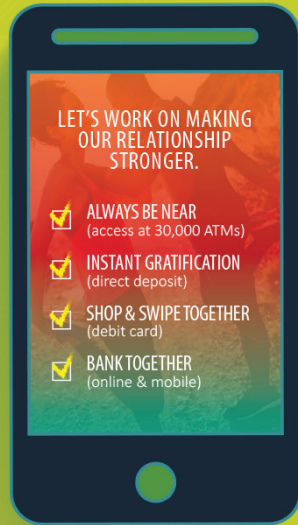


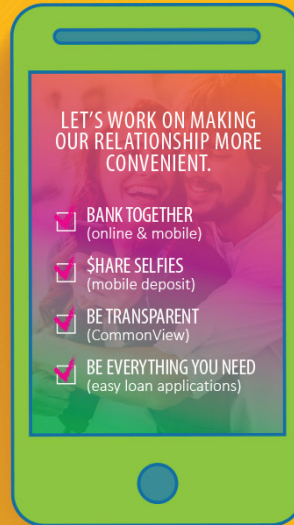
Branch Posters

#RELATIONSHIPGOALS



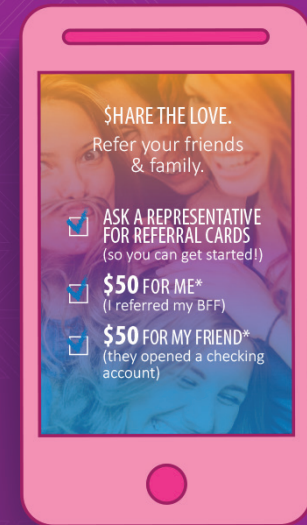
COMMONWEALTH
CENTRAL CREDIT UNION
www.wealthcu.org
Federally Insured by NCUA

#RELATIONSHIPGOALS



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www.wealthcu.org
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#RELATIONSHIPGOALS






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www.wealthcu.org
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*Membership in Commonwealth required. \$50 for new member and new checking account only. Limit one new checking account per new member. All new accounts will be opened by Check Systems. Members with an existing Commonwealth checking account are not eligible. Cash or new cash gift in amount of \$50.00 subject to IRS reporting on Form 1099-INT. Offer is subject to cancellation without notice and cannot be combined with any other offer. Offer may be presented at the time of checking account opening.

#RELATIONSHIPGOALS



LET'S WORK ON MAKING
OUR RELATIONSHIP MORE
CONVENIENT.

-  **BANK TOGETHER**
(online & mobile)
-  **SHARE SELFIES**
(mobile deposit)
-  **BE TRANSPARENT**
(CommonView)
-  **BE EVERYTHING YOU NEED**
(easy loan applications)

LET'S WORK ON MAKING
OUR RELATIONSHIP
STRONGER.

-  **ALWAYS BE NEAR**
(access at 30,000 ATMs)
-  **INSTANT GRATIFICATION**
(direct deposit)
-  **SHOP & SWIPE TOGETHER**
(debit card)
-  **PLAN TOGETHER**
(online & mobile)

SHARE THE LOVE.
Refer your friends
& family.

-  **ASK A REPRESENTATIVE
FOR REFERRAL CARDS**
(so you can get started!)
-  **\$50 FOR ME***
(I referred my BFF)
-  **\$50 FOR MY FRIEND***
(they opened a checking
account)

 **COMMONWEALTH**
CENTRAL CREDIT UNION
www.wealthcu.org

Federally Insured by NCUA

*Membership in Commonwealth required. Referral is for new member online checking account only. Limit one new banking relationship per member. All new accounts will be verified by Clear Payments. Member will see pending transaction on their mobile device. Referral is for new member opening a checking account only. \$50 bonus is based on the first \$500. Offer subject to availability. Offer ends 12/31/14. Offer cannot be combined with any other offer. Deposit must be made to the bank of checking account opening.



#RELATIONSHIPGOALS

We want to meet your family and friends!

SHIPGOALS

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experience with
as possible.
Online and
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ts anywhere,

We can take more pictures together.

Did you know you can deposit checks with your phone from anywhere with Mobile Deposit?

We want you to have instant gratification.

Did you know you can set up direct deposit with us?

We can help keep you organized.

Did you know that CommonView, our personal finance management tool, can help you stay organized? You can manage all of your financial relationships in one place. Create budgets, categorize your expenses and much more!

COMMONWEALTH
CENTRAL CREDIT UNION
P.O. Box 641890
San Jose, CA 95164-1690


PRESORTED
FIRST CLASS MAIL
US POSTAGE
PAID
SAN JOSE, CA
PERMIT NO. 3196

IF YOU LOVE COMMONWEALTH,
WHY NOT SHARE THE LOVE?

friends, co-workers, neighbors or anyone
nonWealth, and you will both receive \$50
new checking account. The sky is the limit.
the more money you can receive!

Additional referral coupons, you can stop by
s or visit wealthcu.org/relationshipgoals.

COMMONWEALTH
CENTRAL CREDIT UNION
wealthcu.org | (800) 564-1588

Federally Insured by NCUA 

WE WANT TO MEET YOUR
FAMILY AND FRIENDS.
Refer your family and friends
and you will both receive

\$50

when they open
a new checking account!

Visit www.wealthcu.org/locations
for a list of branch locations.

RESTRICTIONS APPLY. SEE BACK FOR DETAILS.

WE WANT TO MEET YOUR
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RESTRICTIONS APPLY. SEE BACK FOR DETAILS.

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Valid for new
found only.
\$10 per new
ill be verified by
an existing
found are not
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Referring Member Name

Membership in Commonwealth required and
is available to almost anyone. Valid for new
member and new checking account only.
Limit one new checking account per new
member. All new accounts will be verified by
Check Systems. Members with an existing
Commonwealth checking account are not
eligible. Cash or non-cash gifts in excess of
\$30 are subject to IRS reporting on form
1099-MT. Offer is subject to cancellation
without notice and cannot be combined
with any other offer.

This coupon must be presented at the time
of checking account opening.

Promotion Codes:
Enter MRG for new member.
Enter RRG for referring member.

Promotion Codes:
Enter MRG for new member.
Enter RRG for referring member.

Promotion Codes:
Enter MRG for new member.
Enter RRG for referring member.



#RELATIONSHIPGOALS

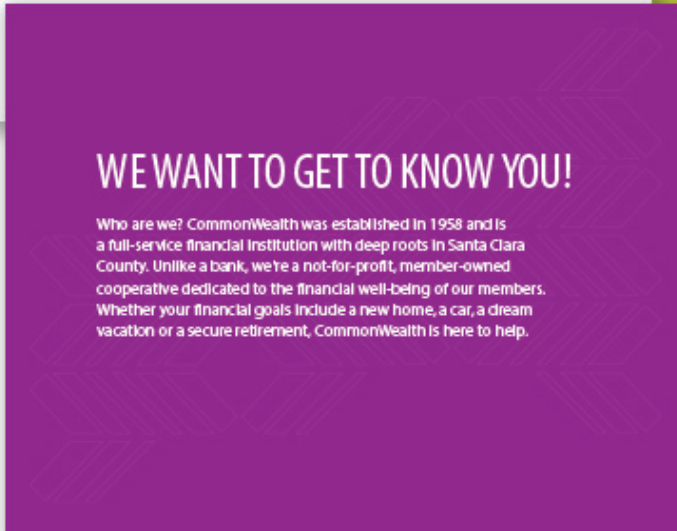
\$100 says you'll love us!

Join CommonWealth today and we'll give you \$100 when you open a checking account.*

COMMONWEALTH
CENTRAL CREDIT UNION
P.O. Box 64-1690
San Jose, CA 95164-1690

PRECORTED
FIRST CLASS MAIL
US POSTAGE
PAID
SAN JOSE, CA
PERMIT NO. 2706

WHAT'S NOT TO LOVE?



WE WANT TO GET TO KNOW YOU!

Who are we? CommonWealth was established in 1958 and is a full-service financial institution with deep roots in Santa Clara County. Unlike a bank, we're a not-for-profit, member-owned cooperative dedicated to the financial well-being of our members. Whether your financial goals include a new home, a car, a dream vacation or a secure retirement, CommonWealth is here to help.

#RELATIONSHIPGOALS

We'll always be near when you

- We want you to have instant gratification.**
You can set up direct deposit with us and save yourself an extra errand!
- We can help keep you organized.**
We offer a personal finance management tool called CommonView that can help you stay organized. You can manage all of your financial relationships in one place. Create budgets, categorize your expenses and much more!
- We are here to help.**
At CommonWealth, we genuinely care about you. We are dedicated to improving the financial well-being of our members and communities.

ACCOUNT GIVE \$100!*

any of our five
CommonWealth
and we will deposit
account right away!
checklist will help our
w. For each item
will receive one
to win an Amazon
ultimate prize of
home! **



#RELATIONSHIPGOALS CHECKLIST

- OPEN A CHECKING ACCOUNT AND RECEIVE \$100*
- SIGN UP FOR ONLINE BANKING
- SIGN UP FOR COMMONVIEW (our personal finance management tool)

and is available to most users. Offer applies to new checking accounts only. Subject to \$28 fee for closing accounts will be waived by Chase Systems. Cash or non-cash gifts in excess of \$10 are subject to IRS reporting without notice and cannot be combined with any other offer. Pre-approval Code CNG190
Once a credit line, you will automatically be entered into an Echo or Echo Dot. For full disclosure and terms & conditions.

LOCATIONS

- MORGAN HILL** — Tennant Station
400 Tennant Station
- MORGAN HILL** — Cochrane Commons
1041 Cochrane Road
- San Jose** — Town Center
1000 S. Bascom Ave.

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wealthcu.org | (800) 564-1588



We've got something pretty great going here, but how can we make our relationship even stronger?

#RELATIONSHIPGOALS



#RELATIONSHIPGOALS

We've got something pretty great going here, but how can we make our relationship even stronger?

[Click here to find out >](#)

Branch Screens

LET'S WORK ON MAKING OUR RELATIONSHIP MORE CONVENIENT.

- BANK TOGETHER (online & mobile)
- SHARE SELFIES (mobile deposit)
- BE TRANSPARENT (CommonView)
- BE EVERYTHING YOU NEED (easy loan applications)

#RELATIONSHIPGOALS

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LET'S WORK ON MAKING OUR RELATIONSHIP STRONGER.

- ALWAYS BE NEAR (access at 30,000 ATMs)
- INSTANT GRATIFICATION (direct deposit)
- SHOP & SWIPE TOGETHER (debit card)
- BANK TOGETHER (online & mobile)

#RELATIONSHIPGOALS

COMMONWEALTH
CENTRAL CREDIT UNION
www.wealthcu.org
Federally Insured by NCUA

SHARE THE LOVE.
Refer your friends & family.

- ASK A REPRESENTATIVE FOR REFERRAL CARDS (so you can get started!)
- \$50 FOR ME* (I referred my BFF)
- \$50 FOR MY FRIEND* (they opened a checking account)

#RELATIONSHIPGOALS

COMMONWEALTH
CENTRAL CREDIT UNION
www.wealthcu.org
Federally Insured by NCUA

*Membership in Commonwealth required. Offer for new members and new checking account only. Cash on new checking account per new member. All new accounts will be opened by mail delivery. Member with existing Commonwealth checking account can not qualify. Cash on new card with the amount of \$50 will subject to off-instantly on Bank 24x7. Offer is subject to availability without notice and subject to withdrawal with any other offer. Program ends 12/31/2014. See branch for details.

Social Media Ads

 **CommonWealth Central Credit Union**
Sponsored · 

Join CommonWealth today and we'll give you \$50 when you open a checking account.



#RELATIONSHIPGOALS
\$50 says you'll love us!



What's not to Love?
Welcome (Other Offerings/#RelationshipGoals)

WEALTHCU.ORG [Learn More](#)

Checking account offer

 **CommonWealth Central Credit Union**
Sponsored · 

We want to meet your family and friends! Refer your family, friends, co-workers, neighbors or anyone you know to CommonWealth, and you will both receive \$50 when they open a new checking account. The sky is the limit. The more you refer, the more money you can receive!





#RelationshipGoals Checklist


We've got something pretty great going here, but how can we even stronger? Check out our #RelationshipGoals Checklist make our relationship stronger and how you can win an Am

COMMONWEALTHCU.ORG

\$50 referral

 **CommonWealth Central Credit Union**
Sponsored · 

We want to meet your family and friends! Refer your family, friends, co-workers, neighbors or anyone you know to CommonWealth, and you will both receive \$50 when they open a new checking account. The sky is the limit. The more you refer, the more money you can receive!



#RELATIONSHIPGOALS

SHARE THE LOVE.
Refer your friends & family.

- SHARE YOUR REFERRAL CARDS WITH EVERYONE (so you can get started!)
- \$50 FOR ME* (I referred my BFF)
- \$50 FOR MY FRIEND* (they opened a checking account)

commonwealthcu.org
#RelationshipGoals Checklist [LEARN MORE](#)

#RELATIONSHIPGOALS

www.wealthcu.org/relationshipgoals

Marketing Components

- ✔ Posters
- ✔ Statement Messages
- ✔ Website Page & Slider
- ✔ Social Media
- ✔ Take-Ones
- ✔ Email Blast

Promotion Details

Dates: February 15 - April 15

We've got something pretty strong going, but we want to make our relationship with our members even stronger. We want members to open new checking accounts and use our services like Online Banking, CommonView and Mobile Deposit. Plus, with our convenient loan application process, we can be everything our members need!

Of course, we want our members to Share the Love and refer their friends and family to CommonWealth too! The referral incentive for this promotion will be bumped up to \$50!

Member Offers

- ✔ \$50 Referral Incentive*
 - ✔ \$50 New Checking Account Incentive*
 - ✔ When members open a checking account, enroll in Online Banking or sign up for CommonView, they will be entered to win an Amazon Echo or Echo Dot at the end of the promotion.
- *If member is referred and opens a new checking, maximum incentive is \$50.

Staff Incentives

- ✔ Monday Jeans Days with #RELATIONSHIPGOALS ribbon through April 15th
- ✔ All employees will have an opportunity to be entered into a drawing to win an Amazon Echo. There will be 3 winners!
- ✔ Refer your friends and family, and you can take advantage of the referral incentive too! (you must be a Commonwealth member to be eligible)

#RELATIONSHIPGOALS

www.wealthcu.org/relationshipgoals

Branch Staff Incentives

- ✔ **MSRs/Call Center**
#Qualified Referrals - For each qualified product/service referral, MSRs will be entered to win an Amazon Echo. A qualified referral would be Checking, Online Banking, eStatements and Bill Pay. Each qualified referral counts as 1 raffle entry.
#New Checking Accounts - Receive bonus raffle entries for each checking account referral that results in a submitted checking account application.
- ✔ **FSRs**
#New Checking Accounts - FSRs will receive their normal \$5 per checking account with minimum \$50 opening balance (\$50 incentive for new checking will count towards this minimum). When FSRs exceed 20 checking accounts during the promotion period, they will receive an additional \$5 per account over the 20.
#Loans - FSRs will receive a bonus of 5 raffle entries to win an Amazon Echo for each checking account they open where they cross sell a loan with that checking account.
#Additional Services - Receive bonus raffle entries when members sign up for Online Banking and CommonView (with new checking).

Staff Tracking & Other Details

- ✔ **MSR/Call Center**
Under Other Opportunities, choose appropriate product/service and select Cross-Sell Refer and route to an FSR Branch Group or Individual FSR. Must be a qualified referral only!
- ✔ **FSR**
No additional steps are required for FSR tracking. The New Checking Account and Funded Loan reports will be used for tracking.
- ✔ **Promotion Codes (refer to MS-520 pg 12)**
Referred New Membership with Checking Account - MRG
Referring Member - RRG
New Checking Incentive - CRG
- ✔ **Additional Tools and Resources**
A message will be added to Sales Opportunities
Take-ones will have referral cards attached
More about Mobile Deposit - www.wealthcu.org/desktopandmobiledeposit
More about Online Banking - www.wealthcu.org/onlinebanking
CommonView videos - www.wealthcu.org/commonview

Results and Winners

#RELATIONSHIPGOALS

New Members
943

New Checking Accounts
455

Online Banking Signups
698

CommonView Signups
287

Totals from Feb. 15, 2017 through April 30, 2017