



HELPING TO NAVIGATE Insurance SOLUTIONS

The Gateway Services Group (GSG) insurance team is devoted to building relationships with the top carriers in each key product area that you may want to offer to your members. We negotiate collaborative pricing models based upon our collective scale, which is proven to deliver value to our credit union clients. We are always scouring the markets for new insurance products that can be delivered by our credit union clients. Our team's wealth of credit union and insurance industry experience offers solutions to meet all of your insurance and risk management needs including: provide due diligence on carriers or new products; manage the implementation of a new product launch or



change of carrier; management of billing and claims process; management of direct mail program; provide staff training to increase sales and product penetration; and full management of insurance program, including reporting and carrier relations. GSG prides itself on helping you navigate the technical and regulatory complexities of the insurance industry. We manage a broad range of insurance products including: credit life/disability, debt protection, property

& casualty, CPI, GAP, warranty, MBI, AD & D, identity fraud, life insurance, long-term care, employee benefits, HSA/HDHP, deferred compensation plans, bond and commercial liability, etc.

**You need expertise
you can trust.**

We deliver it.

Investment PROGRAM MANAGEMENT

You need access to expertise that understands both the credit union environment and the investment industry to build an investment program that is beneficial to the financial health of your credit union – and serves the best interests of your membership.

GSG offers an invaluable resource of expertise in investment program management from top to bottom including:

coaching and recruiting of program personnel, data to assess program performance, tools to provide monthly management reporting, resources for marketing plan development and implementation, and all aspects of managing the broker/dealer relationship and conversion.

GSG wants to optimize member investment programs by delivering a full

range of products and services to meet all member needs. We work with credit unions and CUSO's of all sizes and across the nation. There are no specific requirements except that the credit union/CUSO must be committed to the importance of their investment program and find value in working collaboratively.



PROVIDING INVESTMENT AND INSURANCE SOLUTIONS



A TRUSTED CREDIT UNION PARTNER

GSG is comprised of a team of experienced professionals in investments, trust and insurance. They are available to provide an invaluable resource to a credit union whether to provide the needed expertise to solve a technical question, the data to benchmark the program performance, the day-to-day management of your insurance, trust and investment programs, or the expertise to carry out a project. Credit unions benefit from the best practices learned across all of GSG's credit union clients.

GSG does not have a one-size-fits-all offering, but knows that each credit union has a unique situation and member base. Our solutions are customized based on the needs of each credit union, their field of membership and their goals.

OUR NICHE WITH CREDIT UNIONS

Gateway Services Group (GSG) was created as a CUSO in January, 2003. It is owned by both credit unions and CUSOs and provides credit unions with access to expertise in the areas of investments, insurance and trust services. GSG's services include outsourced management of the credit union's investment, trust and/or insurance programs; consulting services in the areas of investment, trust and insurance program implementation; providing credit unions access to collaborative pricing models; and staff training, coaching and recruiting for investment, trust and insurance programs.

Investments, trust and insurance are all highly technical, regulated product areas requiring specialized expertise for credit unions to maximize the value of these member services. Gateway Services Group has become a trusted resource in the industry for those credit unions interested in delivering the highest quality insurance, trust and investment products to their members in a cost effective and efficient manner.

Our company is committed to providing value-added solutions for the credit union and its members, enhancing the financial return to the credit union, and building deep and lasting member relationships on behalf of our credit union clients.



"We have continued to be delighted with the Debt Cancellation product and program management by Gateway Services Group. They will be our filter for the foreseeable future on all insurance matters."

CHRIS OLDAG
SENIOR VICE PRESIDENT
PATELCO CREDIT UNION

"In 2000 we outsourced all investment and insurance responsibilities to Gateway Services Group. Not having the expertise internally and having access to GSG's collaborative model has been truly a win-win for both the Credit Union and our members."

DOUG FERRARO
PRESIDENT AND CEO
BELLCO CREDIT UNION

"The goal of Gateway Services Group is to be the credit union industry's premier resource for investments and insurance. Everyday our people work to deliver your credit union with the customized support and service to earn the title of "trusted advisor". Using the power of collaboration, we can share best practices, deliver scale, and provide the value that you need to serve members."

SCOTT JENTZ
FOUNDER/CEO
GATEWAY SERVICES GROUP

