

# Interface

A Newsletter from AFTECH

## Client Conference "The Best!"

AFTECH's annual Client Conference in Scottsdale, Arizona, the last week of April drew 67 attendees (from 39 credit unions) to what most participants described as "the best AFTECH Conference ever!"

In addition, 18 AFTECH business partners participated in the

Wednesday evening Technology Center, showcasing innovative products and services from Fiserv and non-Fiserv organizations.

The Client Conference opened Tuesday morning, April 25, with a meeting of the AFTECH Technology Partnership Council (ATPC), followed by an open forum for all interested in ATPC activities.

Wednesday's opening general session featured keynote speaker Mark Sievewright, former president of The Tower Group and now a senior Fiserv executive.

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AFTECH President Joe Antellocy with Lynne Kindy, representing AFTECH STAR Team One Credit Union

## HSAs Catching On

Two AFTECH Clients – MidAmerican in Wichita, Kansas, and Financial Health in Lansing, Michigan – have gone live with AFTECH's Health Savings Account software. Financial Health plans to issue debit cards to its HSA account holders, while MidAmerican is now using a combination of HSA savings and checking accounts, but plans to issue debit cards as well.

MidAmerican's Connie White reports "We have a total of 100 HSA accounts, 41 checking accounts and 59 savings accounts. Total balances are a little over \$85,000.00."

Included in Release 26, the HSA software is expected to get broader use as conventional health insurance plans are replaced by high-deductible plans coupled to Health Savings Accounts. The accounts allow members to shelter up to \$2,000 (for an individual) pre-tax to be used towards medical expenses not covered by insurance.

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Another Fiserv Connection



## ➤ From the President

*AFTECH has offered Disaster Recovery services to its credit union Clients since the 1980s. It began with standby VAX computers, dial-up communications and the promise of AFTECH's expertise should a disaster occur.*

*A lot has changed over the years as Disaster*

*Recovery Services have evolved into Business Continuity Services. Credit unions are forced to evaluate their plans against the real-life experiences of the Gulf Coast & Florida hurricanes, the Midwest power outage and 9/11 disasters. Through it all, AFTECH's promise (& delivery) of expert assistance has remained constant and true.*

### **Value Offering**

*AFTECH's offering has demonstrated real value to our clients. Differentiating us from the mega-center providers are experience, intimacy, skill, multiple custom sites and scalability.*

### **Experience**

*We have worked with credit unions to recover their core systems from downtime and damage resulting from hurricanes and mass power outages to terrorist activities.*

### **Intimacy**

*The staff at AFTECH knows our Clients. We know your software, we know your 3rd party interfaces and we know credit unions. It really goes without saying that 'no one does AFTECH better than AFTECH'.*

### **Skill**

*Expert staff is available to our Clients during disaster situations. Our systems, development, professional services, EFT, support and software distribution staff is all mobilized in the event of a Client recovery situation.*

### **Multiple Sites**

*Both AFTECH's corporate location in Malvern, PA, and ASP data center in Troy, MI, are outfitted and ready for credit union system recovery.*

### **Scalability**

*Through a series of flexible options, credit unions can choose the desired level of service coverage.*

### **Recent Additions**

*We have recently added Strohl Systems PLANet for Credit Unions planning tool, along with electronic backup/restore services. We are working on 3rd party quick connections as well as simplified option packages. The emphasis is on providing coverage to allow for shorter recovery times, and quicker restoration of member services with flexible telecommunications.*

### **Recommendations for our Clients**

*First and foremost, schedule the core system recovery annual test. A good test is extremely important as it exposes weaknesses and ultimately prepares staff for the 'real thing'.*

*Encrypt your backups. Although this goes beyond business recovery, it is an issue that applies to your membership data when it is outside your walls.*

*Perform a gap analysis between your current operation and critical services and the recovery plan document. This is an exercise that should be undertaken annually if not more frequently. IT recovery is only a portion of the overall plan. Make sure all critical operations are addressed.*

*Update the recovery team list of contacts. Don't forget to include vendor contacts and cell phone numbers. Distribute it!*

*As your partner, we know AFTECH is an integral part of your credit union's overall BCS plan. We will be in contact and look forward to meeting and consulting with you as we work together to assess your coverage.*

*We appreciate your business,*

# ATPC Report

The ATPC group has had an exciting month. The Advantage Loan Queue Task Force has been organized, made up of Client participants with a wide range of expertise and background to assist AFTECH. With your input, we are sure that the Loan Queue Product will benefit as a result of this task force. Thank you to those who have chosen to participate. Stay tuned for updates!

The next task force-related project on the schedule is Share Draft and ACH Exception Processing. Are you an expert in this area? We want you to be part of this task force. John Scott, Security Federal Credit Union, will be leading the recruitment of this task force as well, so keep a lookout for information from John. If you are interested in joining this task force, you can send your name and credentials to John at [scottj@securityfcu.org](mailto:scottj@securityfcu.org).

Bob Burghardt of AFTECH reported on the product updates for Release 2006. AFTECH has two Clients live with (HSA) Health Saving Accounts. The Advantage Profile System is in quality assurance,

standing up to rigorous testing with only minor issues.

AFTECH also reported that the Legacy-to-Advantage transactions that we selected to be developed are ahead of schedule and are included in 2006 Pre-Release 3. The Security and Title Tracking module (originally scheduled for the first 2007 Pre-Release) was completed ahead of schedule and will be part of the 2006 Annual Release as well. The ATPC group also discussed enhancements to **aftech@net** security with Multi-Factor Authentication.

Check out the meeting minutes from the ATPC forum held at the AFTECH Annual Conference at [www.aftech.com](http://www.aftech.com).



Colleen Crane

**Colleen Crane**  
Progressions Credit Union

## Client Conference "The Best!"

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Joe Antellocy and AFTECH staff also gave an overview of AFTECH activities since the last Client Conference, and a look ahead at some AFTECH innovation.

Extensive breakout sessions included close-up looks at new AFTECH products, including the integrated ConvergeIT telephone-call center-audio response system; the Advantage Portal and Profiles; network security; Health Savings Accounts; disaster recovery; and more.

The last day of the Conference was based on two tracks: a CEO Forum led by Dan Clark, former CEO of Tallahassee-Leon FCU and now a consultant and author; and a training session aimed at helping Clients implement and maintain AFTECH products, including RD<sup>3</sup>, **aftech@net**, and Membership Relationship Management.

During the conference, AFTECH recognized four Clients for their years of partnership:

- USSCO Federal Credit Union (5 years)
- Progressions Credit Union (10 years)
- CAFL Federal Credit Union (15 years)

• Catholic Federal Credit Union (20 years)

AFTECH also made its third presentation of the AFTECH STAR Award, in recognition of the special partnership between AFTECH and that Client over the past year. This year the STAR Award went to Team One Credit Union of Saginaw, Michigan, for the credit union's role as Innovator in several development projects, and for graciously demonstrating AFTECH products to prospects.



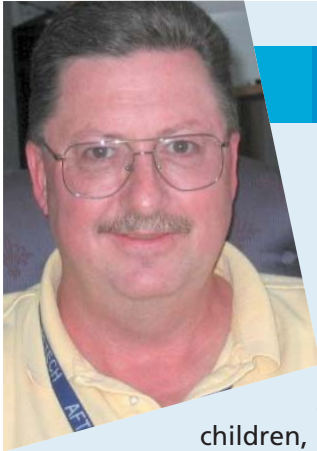
Randy Baldwin, CEO  
Tucson-Old Pueblo CU



Brian Riffle (L), CEO of  
USSCO FCU, chats with  
Dan Rourke, CEO of  
Olean Area FCU



Allan Prindle, CEO of Pan Am Horizons FCU, with  
staff member Alicia Quevedo



## Meet AFTECH:

### Brett Pierce

Meet AFTECH Software and Development Consulting Engineer Brett Pierce.

An Arkansas native and the younger of two children, Brett and his family moved to the suburbs of Chicago while he was still a little boy. In Chicago, Brett joined the Army and was stationed in Germany for three years. In Germany, Brett had an opportunity to travel to places like Austria, Switzerland and France.

After his three years were up, Brett returned to Chicago and attended Harper Junior College and graduated with an Associate's Degree in Business Administration. From Chicago, Brett moved to Los Angeles and attended California

State University. During his 7 1/2 years in California, Brett worked in collections and data processing at Southern California Central Credit Union. It was while working at the credit union that Brett was first introduced to AFTECH, and in 1985 Brett was offered a job as a programmer at AFTECH, here in Pennsylvania.

So what does a Software and Development Consulting Engineer do? Brett programs and maintains the design of Back Office and Advantage.

Brett and his wife of 21 years live in Chester Springs, PA, and are the parents of two boys, ages 14 and 11. In his spare time, Brett enjoys reading both science fiction and mystery books as well as attending his sons' sporting events. He also helped coached a community soccer league in his town.



If you have any questions, concerns, or suggestions about AFTECH, or want more information, please contact:

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