

Enhanced Partnership Collaboration  
Alberta and British Columbia Canada – Summer/Fall 2015

**Re: Wealth Management Collaboration**

**Alberta and British Columbia Canada – September 15<sup>th</sup> 2015**

1<sup>st</sup> Choice Savings and Credit Union, Lakeland Credit Union and Mountain View Credit Union are very pleased to announce the increased scope of InStride Resources Ltd with a new wealth management collaboration.

Preliminary work began on April 2, 2015 at all three Credit Unions to prepare for a full strategic and operational implementation of the collaboration in the third quarter of 2015.

InStride Resources Ltd is a jointly owned CUSO (Credit Union Services Organization) and funded by the three Credit Unions. Since its formation in 2012, InStride has been focused on establishing the organization and determining which functions could benefit by pooling resources and leveraging various strengths. While the primary area of focus has been Information Services and more recently Regulatory Compliance, increasing efficiencies enhancing service levels and maximizing a return in wealth management was an opportunity not to be missed.

In the spirit of collaboration, the InStride partners are now shareholders in **CUSO Wealth Strategies Inc. from British Columbia**. CUSO Wealth Strategies Inc. was formed in 2012 and includes six shareholder credit unions from across the Province. The CUSO provides strategic leadership and operational management services to its shareholders.

The participating BC Credit Unions include Sunshine Coast Credit Union, Summerland Credit Union, Osoyoos Credit Union and EKC MoneyWorks (East Kootenay Community Credit Union) NDCU MoneyWorks (Nelson & District Credit Union) and GFCU MoneyWorks (Grand Forks Credit Union).

Chair of the Board for CUSO Wealth, Mr. Jody Burk (CEO EKC) was very pleased to see the current CUSO expand into Alberta. "We are collaborative organizations who firmly believe that in order to meet the current and future needs of our membership, it is imperative that we continue to explore opportunities like this". Pierre Amyotte (CEO Lakeland CU) represents InStride on the CUSO Wealth Board. "To stay local, we believe we need to think bigger behind the scenes. CUSO Wealth Strategies gives us an opportunity to do both".

For more information about InStride please contact:

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