



# CUNA Mutual Calculator Connector

Integrated to the  
Loan Origination Module

## Quote and Cross-sell CUNA Mutual Group Products

The CUNA Mutual Calculator connector makes it easy and seamless to quote MEMBER'S CHOICE® Guaranteed Asset Protection (GAP) and MEMBER'S CHOICE® Mechanical Repair Coverage (MRC) from a single platform, using CUNA Mutual Group's Internet Web Calculator (IWC) within the Loan Origination module.

### Key Features

#### Directly Access the CUNA Mutual Calculator

On reaching the CUNA Mutual Calculator screen, all pertinent loan, vehicle and member data is securely transferred to the CUNA Mutual Calculator and displayed directly within the system. Using the CUNA Mutual Group pricing and feature configurations, unique to each financial institution, the loan officer can obtain quotes, view graphs and create documents.

#### Retrieve Quotes and Print Documents

A simple "refresh" action, which can be done automatically in the system, pulls in the quoted product options, the cost, the status and any documents created. Documents retrieved for GAP and MRC from the CUNA Mutual Calculator are accessible within the system and can be printed along with all other loan documents at the end of the origination process.

#### Fulfill GAP and MRC Requests

The CUNA Mutual Calculator will continue to support the actual issuance process for GAP and MRC, and loan officers can continue to use the CUNA Mutual Calculator to quote and issue products after the loan event. The loanliner.com report manager will track and report on your sales.

### Benefits

#### Increase Loan Process Efficiency

No longer do loan officers need to toggle between multiple programs during the loan origination process. In addition, the CUNA Mutual Calculator fields are pre-populated with information from the system, and all fees associated with GAP and MRC are included in the loan transaction

automatically, reducing duplicate data entry and the likelihood of human error.

#### Boost Insurance Product Sales

The ability to quote GAP and MRC is built directly into the loan origination workflow, ensuring these products are referenced during every transaction and increasing the likelihood of a successful sale.

#### Provide Multiple Quotes At One Time

Using the connector, loan officers can create quotes for multiple pieces of collateral at one time as part of the loan origination process.

#### Monitor Performance

Using the powerful reporting functionality found in the Loan Origination module, management can easily track and evaluate how often products are being quoted and fulfilled in order to make timely changes in strategy.

### More Information

#### System Requirements

Version 10.24 or higher must be running in order to utilize the CUNA Mutual Calculator connector.



**CUNA  
MUTUAL  
GROUP**

#### Provider Highlight

CUNA Mutual Group is the marketing name of CUNA Mutual Holding Company, its affiliates and subsidiaries. Our insurance, retirement and investment products provide financial security and protection to credit unions and their members worldwide. Our vision: To be a trusted business partner who delivers service excellence



# CUNA Mutual Protection Advisor Connector

Integrated to the Loan Origination Module

## Quote and Cross-sell CUNA Mutual Group Products

The CUNA Mutual Calculator connector makes it easy and seamless to quote MEMBER'S CHOICE® Guaranteed Asset Protection (GAP) and MEMBER'S CHOICE® Mechanical Repair Coverage (MRC) from a single platform, using CUNA Mutual Group's Protection Advisor within the Temenos Loan Origination module.

### Key Features

#### Directly Access CUNA Mutual's Protection Advisor

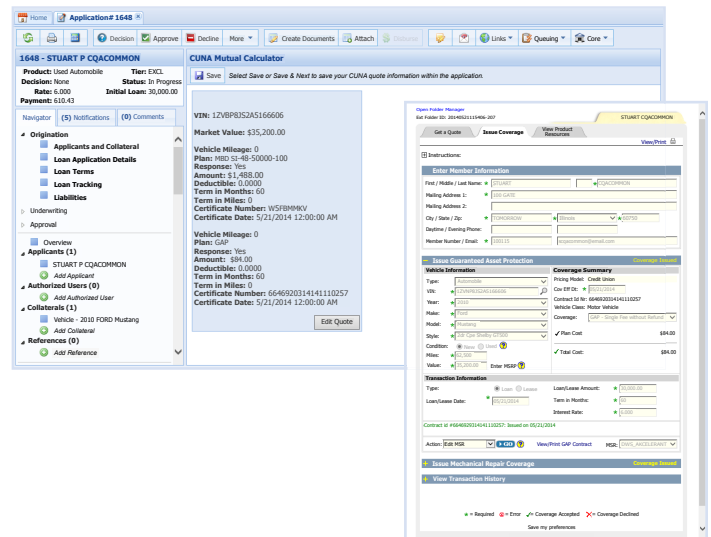
Upon reaching the CUNA Mutual Protection Advisor screen, all pertinent loan, vehicle, and member data will be securely transferred to the CUNA Mutual Protection Advisor and displayed directly within the Loan Origination module. Using the unique CUNA Mutual Group pricing and feature configurations made by each financial institution, the loan officer can obtain quotes, view graphs, and create documents.

#### Retrieve Quotes and Print Documents

A simple "refresh" action, which can be done automatically in the system, pulls in the quoted product options, the cost, the status, and any documents created. Documents retrieved for GAP and MRC from the CUNA Mutual Protection Advisor are accessible within the Loan Origination module and can be printed along with all other loan documents at the end of the origination process.

#### Fulfill GAP and MRC Requests

The CUNA Mutual Protection Advisor will continue to support the actual issuance process for GAP and MRC, and loan officers can continue to use the CUNA Mutual Calculator to quote and issue products after the loan event. The loanliner.com report manager will track and report on your sales.



Upon arriving at the CUNA Mutual Protection Advisor screen, loan officers will be provided with the option to create or edit a quote. The CUNA Mutual Protection Advisor screen will then launch, and the loan officer can complete the steps required to fulfill any GAP or MRC requests.

## Benefits

### Increase Loan Process Efficiency

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No longer do loan officers need to toggle between multiple programs during the loan origination process. In addition, the CUNA Mutual Protection Advisor fields are pre-populated with information from the Loan Origination module, and all fees associated with GAP and MRC are included in the loan transaction automatically, reducing duplicate data entry and the likelihood of human error.

### Boost Insurance Product Sales

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The ability to quote GAP and MRC is built directly into the loan origination workflow, ensuring these products are referenced during every transaction and increasing the likelihood of a successful sale.

### Provide Multiple Quotes At One Time

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Using the connector, loan officers can create quotes for multiple pieces of collateral at one time as part of the loan origination process.

### Monitor Performance

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Using the powerful reporting functionality found in the Loan Origination module, management can easily track and evaluate how often products are being quoted and fulfilled in order to make timely changes in strategy.

## More Information

### System Requirements

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Version 10.24 or higher must be running in order to utilize the CUNA Mutual Protection Advisor connector.

### Provider Highlight

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CUNA Mutual Group is the marketing name of CUNA Mutual Holding Company, its affiliates and subsidiaries. Our insurance, retirement and investment products provide financial

security and protection to credit unions and their members worldwide. Our vision: To be a trusted business partner who delivers service excellence through customer-focused products and market-driven insight.

*In those states where MEMBER'S CHOICE® Mechanical Repair Coverage is offered as an insurance product, it is underwritten by Virginia Surety Company, Inc., Chicago, Illinois. The Mechanical Repair program is administered by Consumer Program Administrators, Inc., and Automotive Warranty Services of Florida, Inc., Florida License #60023.*

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*For more information about the connector, please contact your Temenos Account Manager. You may also contact the CUNA Mutual Group directly at 1-877-264-5363.*

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