

The relationship is your greatest asset. Let's make sure it shows up everywhere.

Today's members and customers expect personalized guidance the moment they need it: on their phone or laptop, before they ever walk into a branch. And even when they do come in, your frontline team is too often tied up in data entry to deliver the deeper support that builds real loyalty. Valusync brings the personalized, face-to-face experience your institution is built on, into the digital channels where the next generation lives, while clearing manual work and supporting your team so they can have the conversations that matter.

WHAT WE DELIVER

Personalized financial guidance

Step-by-step planning that reflects each person's real financial picture, with a plain-language explanation of every recommendation your compliance team can stand behind.

Smart product matching

Connects the right products to the right people at the right moment, aligned to the personalized financial plan and based on actual financial needs, not generic offers.

Automated workflows

Removes the manual steps in new account onboarding, data collection, and follow-up, so your team's energy goes toward relationships, not paperwork.

MEASURABLE OUTCOMES

20+ min

saved per new account interaction

Time your team gets back to spend on the conversations that build lasting relationships.

22%

of people select a second product to explore

Real share-of-wallet growth driven by personalized guidance, not a generic cross-sell prompt.

\$1,800

per year improvement in member financial health

Measurable progress for the people your institution exists to serve.

10%

reduction in member acquisition cost

Lower cost per new member or customer through smarter onboarding and reduced manual processing.

THE OPPORTUNITY

Only 15% of Millennials and Gen Z consider a purpose-driven financial institution to be their primary banking partner.

— CUNA Mutual Group

THE PROBLEM

Frontline staff spend 20+ minutes per new account on manual data collection before any real conversation begins.

— Valusync pilot data, DCU 2025

THE ANSWER

Deliver the guidance digitally. Free up the people. Measure the difference in 90 days.

— Valusync 90-Day Sprint

WHY INSTITUTIONS CHOOSE VALUSYNC
COMPLIANCE & EXPLAINABILITY

**Built for regulated institutions.
Audit-ready from day one.**

SOC 2 Type I in progress with Thoropass. GLBA, NIST, FDIC, and NCUA aligned. Every recommendation comes with a plain-language explanation visible to your compliance team and the person receiving it. Your risk team gets a vendor that speaks their language before the conversation even starts.

DESIGNED FOR YOUR SCALE

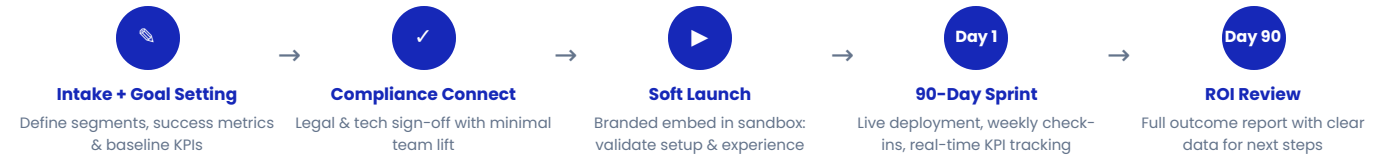
**Designed for community institutions.
Not a scaled-down enterprise platform.**

Valusync was built secure-by-design from the ground up for purpose-driven financial institutions: community banks, regional banks, and member-owned institutions that serve the people big institutions overlook. Our compliance posture, pricing, and integration model reflect the institutions you actually are.

SPEED TO VALUE

Live with measurable ROI in 90 days. No rip-and-replace.

A single branded embed drops into your existing digital experience. No months-long IT project. No displacement of systems your team already knows. Most institutions are live and tracking real KPIs within a 90-day sprint, with a full ROI review at the end that gives leadership clear data for the next conversation.

THE 90-DAY SPRINT

SPRINT TIERS

<p>Community</p> <p>\$12k-\$20k</p> <p>Community financial institutions Under 50,000 members / customers</p>	<p>Regional</p> <p>\$20k-\$35k</p> <p>Regional institutions 50,000-500,000 members / customers</p>	<p>National</p> <p>\$35k-\$50k</p> <p>Super-regional & national Over 500,000 members / customers</p>
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RECOGNIZED BY


START THE CONVERSATION

Ready to see what 90 days can do for your institution?

Reach out directly or click below to schedule a conversation and learn more about starting a sprint.

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[Schedule a Call](#)