

League InfoSight Product Sales and Access Policy

Effective Date: 05/09/2024

General Policy Statement:

League InfoSight's mission is to work collaboratively to enable Leagues/Associations to provide the best compliance solutions for member credit unions. To carry out this mission and provide valuable solutions to credit unions, **League InfoSight will allow credit union sales to non-affiliated credit unions, with the approval of the "home" League/Association.**

Guidelines:

- 1. Non-affiliate Pricing.** Credit unions not affiliated with their League/Association interested in purchasing CU PolicyPro or RecoveryPro will have a separate pricing model.

CU PolicyPro

****New pricing effective as of 3/14/2024 for new credit unions. Existing credit unions will be stepped up starting January 1, 2025.**

- Under \$50 million: \$2,000 annually
- Between \$50 million - \$150 million: \$2,499 annually
- Between \$150 million - \$350 million: \$2,999 annually
- Between \$350 million - \$1 billion: \$6,499 annually
- Over \$1 billion: \$11,499 annually

RecoveryPro

- Under \$50 million: \$599 annually
- Between \$50 million - \$150 million: \$1,399 annually
- Between \$150 million - \$350 million: \$2,599 annually
- Between \$350 million - \$1 billion: \$6,199 annually
- Over \$1 billion: \$10,999 annually

Education/Training

- \$2,500 per credit union employee (virtual)

2. Affiliate Pricing. Credit unions that are affiliated with their League/Association are charged the national retail sales pricing.

CU PolicyPro

****New pricing effective as of 3/14/2024 for new credit unions. Existing credit unions will be stepped up starting January 1, 2025.**

- Under \$50 million: \$695 annually
- Between \$50 million - \$150 million: \$895 annually
- Between \$150 million - \$350 million: \$1,499 annually
- Between \$350 million - \$1 billion: \$2,999 annually
- Over \$1 billion: \$4,999 annually

RecoveryPro

- Under \$50 million: \$249 annually
- Between \$50 million - \$150 million: \$549 annually
- Between \$150 million - \$350 million: \$1,049 annually
- Between \$350 million - \$1 billion: \$2,549 annually
- Over \$1 billion: \$4,549 annually

Education/Training

- \$799 per credit union employee (virtual)

3. CUSO and Business Entity Pricing. CUSOs and other qualified business entities will have the following pricing model based on their number of employees.

CU PolicyPro

- 0-50 employees: \$1,999 annually
- 50-100 employees: \$2,999 annually
- 100-200 employees: \$4,999 annually
- Over 200 employees: \$6,999 annually

RecoveryPro

- 0-50 employees: \$1,549 annually
- 50-100 employees: \$2,549 annually
- 100-200 employees: \$4,549 annually
- Over 200 employees: \$6,549 annually

4. AGS Product Pricing. Through a partnership with All Goals Solutions (AGS), affiliated credit unions will receive the Account Insurance Estimator (AIE) and Check Deposit Notice Generator for free as a member benefit. Credit unions interested in a premium version of the product, can purchase **directly from AGS at a discounted price point.**

5. Revenue Sharing. League InfoSight will share revenue for sales in the following scenarios:

CU PolicyPro – for non-affiliated credit unions

- \$1,000 revenue share with the League/Association for each non-affiliate purchase if they are wholesale provider.

Education/Training

- 20% revenue sharing back to the League/Association the credit union employee is a primary member.

6. Legacy Credit Unions.

CU PolicyPro

Credit unions that had access to CU PolicyPro prior to their League/Association offering the wholesale program, who later disaffiliate with their League/Association, will be permitted to purchase CU PolicyPro directly from League InfoSight.

Newly disaffiliated credit unions wanting access will be charged the non-affiliate pricing.

League InfoSight will notify the League/Association of a credit union's legacy status and the League/Association will either communicate with the credit union directly or may delegate that to League InfoSight in order to determine if the credit union wishes to maintain CU PolicyPro access at the non-affiliate pricing.

RecoveryPro

Credit unions that had access to RecoveryPro prior to League InfoSight's purchase of the product who are not affiliated with their League/Association, will be permitted to continue purchasing the product directly from League InfoSight at the nonaffiliate price.

Account Insurance Estimator and Check Deposit Notice Generator

Credit unions that have access to the Account Insurance Estimator and/or Check Deposit Notice Generator who are existing clients of AGS, will be permitted to purchase those products directly through AGS and outside of the InfoSight platform.