

# 2017 DDI User Group

Building Community Together...

## Investment Roundtable





# Agenda



- Group Discussion Expectations
- Split up into groups
- Discuss Investment Questions



# Investment Roundtable



**What is the best approach that your organization has found to attract new investment dollars?**

- Special term note with limited time special interest rates?
- Promoting tiered rates with better interest rates for larger amounts?
- Allowing additional deposits in term notes?
- How do you market this to your constituent base?



# Investment Roundtable



## What has your organization done to streamline the processing of investments?

- Share with your group your experiences of processes that have increased efficiencies
- Share processes that have not been beneficial in creating more streamline processes.
- What investment processes do you that you think could be automated?



# Investment Roundtable



## Does your group offer retirement accounts?

- Do you use a 3<sup>rd</sup> provider to help service them? Which one? Why?
- What type of accounts do you offer and why?



# Investment Roundtable



## Does your group currently offer online investment purchases?

- New investments, additional deposits, recurring deposits
  - If no, why not?
  - If yes, what benefits have you seen?
- How do you market this to your customers?



# Investment Roundtable



## How does your Organization handle maturity notice processing?

- How many days in advance do you send the notice?
- What is your process for ensuring the investments get processed based on the returned notice information?
- What is your process for handling no response for states like CA and OR?
- What system enhancements would you like to see to streamline this process for your staff or constituents?





# Investment Roundtable



**Do you incentivize your loan borrowers to have their constituents invest with your organization to get a better interest rate on their loan?**

- Do your rates change on invest dollars?
- How do you track the loan support?
- In your experience, has this been a successful way to increase investment dollars long term?



# Investment Roundtable



Does your organization have a way to verify banking and account information for investors that want ACH/EFT payments?

- Do you use a third party?
- Do you require a voided check, or another process?



# Investment Roundtable



For investment redemptions, do you require the certificate to be returned, or are you book entry?

- What is your process for tracking redemptions?



# Investment Roundtable



## How does your organization handle EFT/ACH interest at Month end?

- Do you create the ACH file in advance to ensure that the interest dollars arrive by month end?
- Does your organization desire to have the expense hit your G/L account and clear your bank in the same month or do you just account for it as an outstanding item until the following month?



# Investment Roundtable



How do you handle multi-site/remote employees and making it seamless for your constituents and coworkers?



# Investment Roundtable



What ideas/topics does would the group like to discuss?



# Webinars and Touchbases



## Webinars:

- Monthly hour long sessions
- Open Q&A time at the end of the session
- Link to the webinar for future viewing
- PDF setup and checklist guide
- Cost per organization: \$75/month

## Touchbases:

- Free hour long sessions
- Monthly, Bi-Monthly, or Quarterly
- Discuss open or new requests, software needs, etc.
- Use allotted time for training on DDI-Connect™

LET'S  
WORK  
TOGETHER



# Discussion, Questions, Comments



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