

Step 1: Click on the **Peer Group** drop down, located in the upper left hand side of the screen. Then Click –**Create Peer Group-** (the first option in the drop down)

Strengths and Weak Lending Financial Performar Member Value Roles Dashboards Operational Data My Packets	-Create Peer Group- All Credit Unions in U.S. (D) Credit Unions \$100M-\$250M (D) Credit Unions \$20M-\$20M (D) Credit Unions \$20M-\$50M (D) Credit Unions \$250M-\$500M (D) Credit Unions \$250M-\$10 (D) Credit Unions \$50M-\$10 (D) Credit Unions \$5M-\$100M (D) Credit Unions Less than \$2M (D) Credit Unions over \$1B (D)
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Step 2: Set the Financial criteria for your Peer Group.

- **1.** You may enter minimum and/or maximum ranges for each criterion please be sure to use the notation directions (boxed in red).
- 2. To see which credit unions match the criteria you set, click the **Preview** button.
- 3. To exclude a specific credit union(s) from your Peer Group, select it in the preview table and click **Remove.**

	als Geography	Supplier Rela	ationships	Include/Ex	clude			
'inancials:	: Select institutions th	at meet any <mark>f</mark> in	ancial crit	eria by enter	ing minimum and	/or maximum val	ues for any of the	formulas below.
Select crite	ria using formulas and	account codes:	Minimum	1	Maximum	When	setting a minimu	m and maximum criteri
Assets				100m	550	m use th	e following notati	on:
Loans						k - Th	ousand	
Members			100			m = M		
Branches					1	0 b = Bil	lion	
			1					
Net Worth/	Assets		0					to set BOTH a minimum
ROA								u can if it fits your
Loans/Shares						analy	SIS	
Loans/Shai	res					analy	515.	
Matching	Institutions: [1019]	× c			Preview	→ Next	2	1
Matching State			Asse	ets	Assets		2 Branches	
Matching	Institutions: [1019] Name		Asse lign	ets 549,716,796	Assets 549,716,796	→ Next Members 25457	Branches 6	-
Matching State MA	Institutions: [1019] Name	A	Asse lign ealth	ets	Assets 549,716,796 548,652,865		Branches 6 9	- 0
Matching State MA MD	Institutions: [1019] Name	A al Institutes of He	Agse align ealth ncial	ets 549,716,796 548,652,865	Assets 549,716,796 548,652,865 545,704,728		Branches 6 9 9	-
Matching State MA MD FL	Institutions: [1019] Name	A al Institutes of He Tropical Finar Hawaiiar	Agse align ealth ncial	549,716,796 548,652,865 545,704,728	Assets 549,716,796 548,652,865 545,704,728 542,082,324		8 <u>ranches</u> 6 9 9 9	-
Matching State MA MD FL HI	Institutions: [1019] Name Nationa	A al Institutes of He Tropical Finar Hawaiiar C uiversity Of Kentu	Agse align ealth ncial on Tel original prion acky	549,716,796 548,652,865 545,704,728 542,082,324 540,057,635 539,724,561	Assets 549,716,796 548,652,865 545,704,728 542,082,324 540,057,635 539,724,561		Branches 2 6 9 9 9 9	-





Step 3: Click the **Geography** tab. Set the Geographical criteria for your Peer Group.

- 1. By default, all states are selected. To deselect states, click the **No States** button.
- 2. To select a state(s), click on the state on the map so it turns grey.
- 3. To select a **NCUA Region**, click on the region name in the list of regions.

Financial	ls Geography	Supplier Relationships	Include/Exclud	e			
С ні с с с с с с с с	OR ID CA NV UT AZ	MT ND MN WY SD V CO	WI MIG IL IN C MO TN AR TN LA MS AL	H PA NC GA FL V	ME VT MA CT RI NJ DE DC unselected	3 NCUA REGION I: New Englan II: Mid Atlantic II: Southeast V: Central V: Western All States ▲ Back ★ Clear	d 🗍 🖳
Matching State	Institutions: [74] Name	Assets	Ass	ets	Members	Branches	ĺ
NV	Clark County	5	530,257,488	\$530,257,488	3399	02 5	0
UT	Utah Power		\$528,552,100	\$528,552,100	2492	24 7	
NV	Greater Nevada		505,918,244	\$505,918,244	4687	77 9	
NH	Triangle		\$505,375,124	\$505,375,124	433	12 8	
INII	Boulder Dam		496,548,701	\$496,548,701	208	19 1	
NV	Doulder Dalli			the second se			





Step 4: Click the **Supplier Relationships** tab. Here you may shape your peer group based on institutions that use specific vendors.

1. In the **Type of Service** list, select from various service types. Click on any service type and the specific vendors will appear in the right-hand list labeled **Providers**.

Financials	Geography	Supplier Relationships	Include/Exclude
endor-Based S	election You ma	y select institutions that u	se specific vendors. You can choose different sets of vendors of each type.
Type of Servic 3rd Party ALM ALM Software Apple Pay Auditor Bill Payer	e Analysis Partner	0	Providers Select All Clear All

2. Choose specific vendors in the **Providers** list. By default, all vendors are selected. **NOTE:** If you wish to select more than one vendor, you must hold down the **Ctrl** key on your keyboard when you click. If you are a MAC user, hold down the **Command** key.

Financials	Geography	Supplier Relationships	Include/Exclude				
Jendor-Based Selection You may select institutions that use specific vendors. You can choose different sets of vendors of each type.							
rpe of Service pple Pay uditor III Payor C Processor heck 21 Toll theck Printer			Providers CO-OP Financial Services CUProdigy Card Services for Credit Unions Corporate One Covera Card Solutions Credit Union Card Center Fis				





Step 5: Click the **Include/Exclude** tab. Here you may conduct a final review of your Peer Group.

- **1.** To **Exclude** credit unions from your Peer Group, uncheck the box to the left of the credit union(s).
- 2. When you are satisfied with your Peer Group, click **Name & Finish** in the lower right hand corner.

Fin	nancials	Geography	Supplier Relationships	Include/Exclud	le			
at	ching Ins State	titutions: [21] Selec Name	ted: [19]	Assets	Assets	Members	Branches	
1	NV	Elko		\$135,764,368	\$135,764,368	13453	3	54
1	NH	New Hampshire		\$234,968,788	\$234,968,788	16540	3	
1	ME	Town & Country		\$267,116,697	\$267,116,697	30997	6	
0	ME	Peopleschoice		\$157,094,862	\$157,094,862	15329	4	
0	ME	Bangor		\$126,772,765	\$126,772,765	14557	3	
)	ID	ICON		\$227,961,822	\$227,961,822	22187	7	
0	ID	Capital Educators		\$391,846,7 <mark>1</mark> 5	\$391,846,715	52158	7	
)	ID	Beehive		\$190,134,909	\$190,134,909	22193	4	
0	ID	TruGrocer		\$226,760,562	\$226,760,562	29828	6	
1	со	Sterling		\$127,698,193	\$127,698,193	8758	2	
1	со	Space Age		\$106,596,890	\$106,596,890	14673	1	
1	со	Red Rocks		\$235,624,886	\$235,624,886	17178	2	
0	со	Sunwest Education	nal	\$110,136,085	\$110,136,085	10996	3	
1	со	Denver Community	(\$266,930,121	\$266,930,12 <mark>1</mark>	25297	3	
cł	-	exclude a specific i Back X Cl	nstitution(s) from your a	nalysis, uncheck	Contract Include	of that credit uni ne & Finish	on's name.	2

Step 6: Before clicking **Save**, type a name for the Peer Group. Click **Yes** if you would like to immediately use the Peer Group in your current analysis. Click **No** if you would like to use the Peer Group at a later time.

NAME IN POWERT MANAGE OF ADDRESS OF	
What would you like to call this peer group?	
Test PG - HowTo Doc	
Would you like to use this as the current peer g Yes 	roup?
No	





NOTE: To access your saved custom-built Peer Groups, click on the **Peer Group** drop down. Your custom-built Peer Groups will be highlighted in pink.

	-Create Peer Group-	
k	All Credit Unions in U.S. (D)	
	Credit Unions \$100M-\$250M (D)	
1	Credit Unions \$10M-\$20M (D)	-
	Credit Unions \$20M-\$50M (D)	
	Credit Unions \$250M-\$500M (D)	
	Credit Unions \$2M-\$5M (D)	
	Credit Unions \$500M-\$1B (D)	
	Credit Unions \$50M-\$100M (D)	
	Credit Unions \$5M-\$10M (D)	
	Credit Unions Less than \$2M (D)	
H	Test PG - HowTo Doc 🧹	-
	Credit Unions over \$1B (D)	

