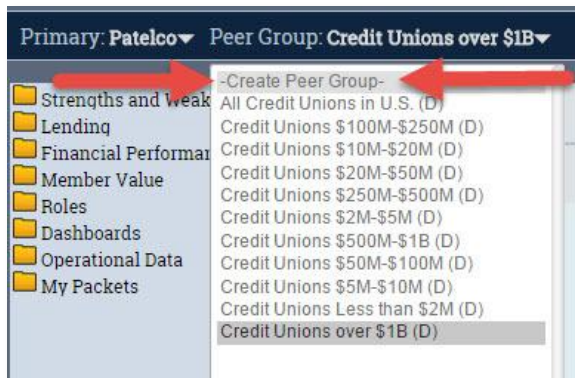


HOW-TO CREATE A PEER GROUP: 6 EASY STEPS TO CUSTOM PEER GROUP CREATION

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)



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**.

Financials: Select institutions that meet any financial criteria by entering minimum and/or maximum values for any of the formulas below.

Select criteria using formulas and account codes:	Minimum	Maximum
Assets	100m	550m
Loans		
Members	100	
Branches		10
Net Worth/Assets		
ROA		
Loans/Shares		

When setting a minimum and maximum criteria use the following notation:
k = Thousand
m = Million
b = Billion
**Note: You do not have to set BOTH a minimum and a maximum, but you can if it fits your analysis.*

Clear Preview Next

Matching Institutions: [1019]

State	Name	Assets	Assets	Members	Branches
MA	Align	549,716,796	549,716,796	25457	6
MD	National Institutes of Health	548,652,865	548,652,865	41008	9
FL	Tropical Financial	545,704,728	545,704,728	53684	9
HI	Hawaiian Tel	542,082,324	542,082,324	55332	9
TN	Orion	540,057,635	540,057,635	58517	10
KY	University Of Kentucky	539,724,561	539,724,561	58334	5

Remove *Highlight any institution to **remove**. Hold down CTRL to select more than one. Name & Finish

HOW-TO CREATE A PEER GROUP: 6 EASY STEPS TO CUSTOM PEER GROUP CREATION

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.

Geographic Selection: Choose one or more states for the institutions to use.

NCUA REGIONS

- I: New England
- II: Mid Atlantic
- III: Southeast
- IV: Central
- V: Western

Matching Institutions: [74]

State	Name	Assets	Assets	Members	Branches
NV	Clark County	\$530,257,488	\$530,257,488	33992	5
UT	Utah Power	\$528,552,100	\$528,552,100	24924	7
NV	Greater Nevada	\$505,918,244	\$505,918,244	46877	9
NH	Triangle	\$805,375,124	\$805,375,124	43312	8
NV	Boulder Dam	\$496,548,701	\$496,548,701	20819	1
CO	Air Academy	\$472,706,829	\$472,706,829	46627	8

Remove *Highlight any institution to **remove**. Hold down CTRL to select more than one.

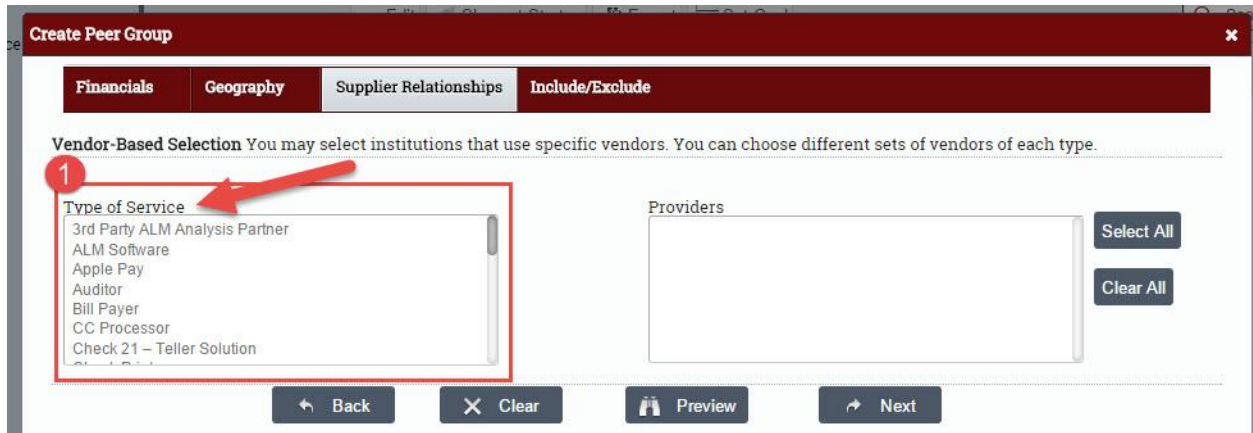
Name & Finish

HOW-TO CREATE A PEER GROUP:

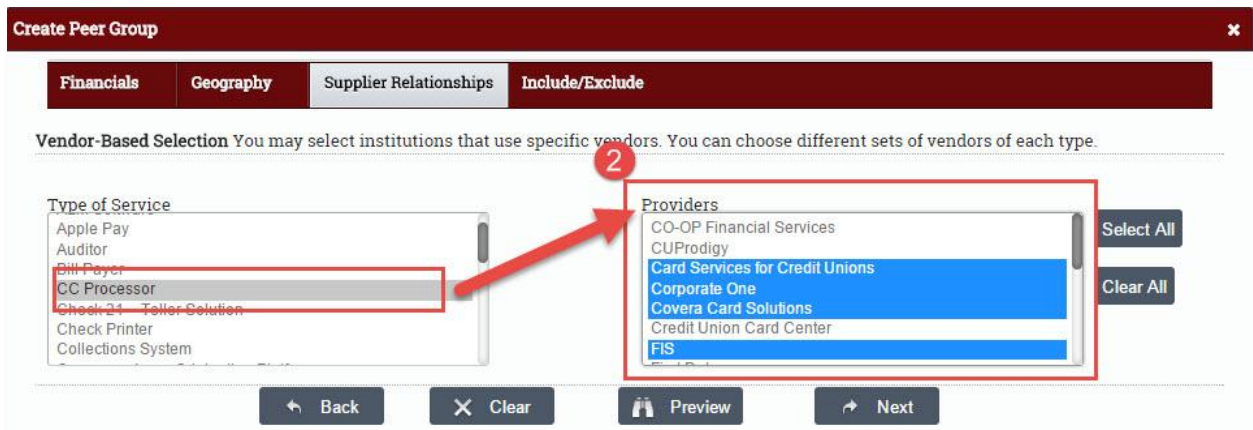
6 EASY STEPS TO CUSTOM PEER GROUP CREATION

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**.



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.



HOW-TO CREATE A PEER GROUP: 6 EASY STEPS TO CUSTOM PEER GROUP CREATION

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.

Create Peer Group

Financials | Geography | Supplier Relationships | **Include/Exclude**

Matching Institutions: [21] Selected: [19]

State	Name	Assets	Assets	Members	Branches
<input checked="" type="checkbox"/>	NV Elko	\$135,764,368	\$135,764,368	13453	3
<input checked="" type="checkbox"/>	NH New Hampshire	\$234,968,788	\$234,968,788	16540	3
<input checked="" type="checkbox"/>	ME Town & Country	\$267,116,697	\$267,116,697	30997	6
<input checked="" type="checkbox"/>	ME Peopleschoice	\$157,094,862	\$157,094,862	15329	4
<input checked="" type="checkbox"/>	ME Bangor	\$126,772,765	\$126,772,765	14557	3
<input type="checkbox"/>	ID ICON	\$227,961,822	\$227,961,822	22187	7
<input checked="" type="checkbox"/>	ID Capital Educators	\$391,846,715	\$391,846,715	52158	7
<input type="checkbox"/>	ID Beehive	\$190,134,909	\$190,134,909	22193	4
<input checked="" type="checkbox"/>	ID TruGrocer	\$226,760,562	\$226,760,562	29828	6
<input checked="" type="checkbox"/>	CO Sterling	\$127,698,193	\$127,698,193	8758	2
<input checked="" type="checkbox"/>	CO Space Age	\$106,596,890	\$106,596,890	14673	1
<input checked="" type="checkbox"/>	CO Red Rocks	\$235,624,886	\$235,624,886	17178	2
<input checked="" type="checkbox"/>	CO Sunwest Educational	\$110,136,085	\$110,136,085	10996	3
<input checked="" type="checkbox"/>	CO Denver Community	\$266,930,121	\$266,930,121	25297	3

Quick Tip: To exclude a specific institution(s) from your analysis, uncheck the box to the left of that credit union's name.

← Back | X Clear | **Name & Finish**

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.

Save peer group

What would you like to call this peer group?

Would you like to use this as the current peer group?
 Yes
 No

Save

HOW-TO CREATE A PEER GROUP: 6 EASY STEPS TO CUSTOM PEER GROUP CREATION

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.

