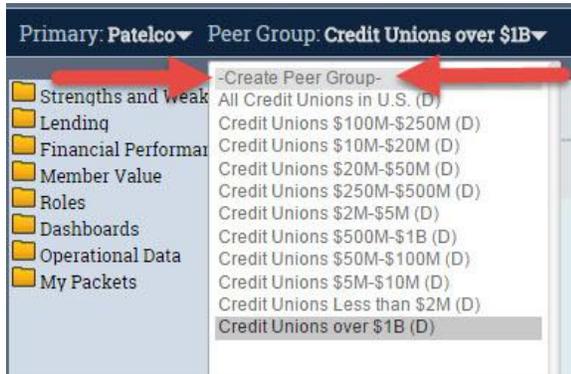


HOW-TO CREATE A PEER GROUP: 5 STEPS TO CUSTOM PEER GROUP CREATION

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: 5 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: [48]

State	Name	Assets	Assets	Members	Branches
NE	Centris	\$526,126,496	\$526,126,496	81877	10
WY	Warren	\$525,394,714	\$525,394,714	50386	8
OK	Oklahoma Central	\$486,854,594	\$486,854,594	34574	9
OK	Oklahoma Employees	\$435,376,616	\$435,376,616	41565	8
MT	Missoula	\$398,808,547	\$398,808,547	44383	6
WY	Meridian Trust	\$298,688,803	\$298,688,803	23140	5

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

HOW-TO CREATE A PEER GROUP: 5 STEPS TO CUSTOM PEER GROUP CREATION

Step 4: 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.

Matching Institutions: [48] Selected: [46]

State	Name	Assets	Assets	Members	Branches
<input checked="" type="checkbox"/>	NE Siouxland	\$154,539,342	\$154,539,342	17319	6
<input checked="" type="checkbox"/>	NE Nebraska Energy	\$246,822,818	\$246,822,818	10678	1
<input checked="" type="checkbox"/>	NE Mutual 1st	\$106,056,237	\$106,056,237	11866	2
<input checked="" type="checkbox"/>	NE Four Points	\$120,241,663	\$120,241,663	7173	1
<input checked="" type="checkbox"/>	NE Liberty First	\$176,454,949	\$176,454,949	19740	5
<input type="checkbox"/>	NE Centris	\$526,126,496	\$526,126,496	81877	10
<input checked="" type="checkbox"/>	MT Valley	\$202,777,298	\$202,777,298	25013	7
<input type="checkbox"/>	MT Rocky Mountain	\$158,809,462	\$158,809,462	14198	4
<input checked="" type="checkbox"/>	MT Southwest Montana Community	\$101,026,248	\$101,026,248	7271	2
<input checked="" type="checkbox"/>	MT Montana	\$200,039,887	\$200,039,887	22272	3
<input checked="" type="checkbox"/>	MT Missoula	\$398,808,547	\$398,808,547	44383	6
<input checked="" type="checkbox"/>	MT Lincoln County	\$104,451,856	\$104,451,856	6214	3
<input checked="" type="checkbox"/>	MT Altana	\$219,393,515	\$219,393,515	18290	7
<input checked="" type="checkbox"/>	MT Helena Community	\$152,260,551	\$152,260,551	14905	4

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

Buttons: Back, Clear, Name & Finish

Step 5: 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.

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: 5 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.

