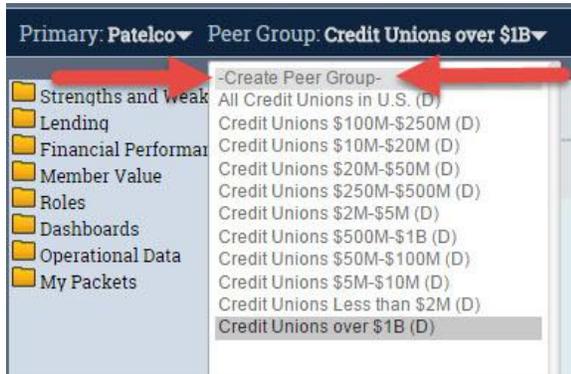# HOW-TO CREATE A PEER GROUP:
5 STEPS TO CUSTOM PEER GROUP CREATION

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.**

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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.

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.*

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.

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.

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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.