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## TruStage™ Announces CEO Retirement and Successor

On June 7, Robert N. Trunzo, President and Chief Executive Officer, announced his plans to retire on October 1, 2023. The Board of Directors has unanimously appointed Terrance Williams, formerly Allstate's President of Protection Products & Services Group, to succeed Trunzo as President and Chief Executive Officer of TruStage. [Read more.](#)

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## Discovery2023 registration is open!

TruStage's annual Discovery conference is being held on Thursday, August 10, 9:00 AM – 4:00 PM CT. This year's event is jam-packed with influential speakers to motivate and inspire the next generation of industry leaders.

We encourage our technology partners to participate in this event. Without you, we wouldn't be able to serve credit unions across the country.

Discovery2023 is virtual and free, with an impressive agenda including keynote speaker and Apple co-founder, Steve Wozniak. Other sessions will cover:

- Economic trends
- Embedded finance
- Financial wellbeing for all
- Credit union industry trends
- Creative leaps for the future of work
- And more!

Check out the agenda and [register today!](#)

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## TruStage™ Branding call for Statements of Work/ Estimates

As of May 23<sup>rd</sup>, we are now officially TruStage! If you have estimates or Statements of Work to submit to us for changes you've made (or are planning to make) to your User Interfaces, please get these to us for processing by 8/1/2023. If you need us to review any changes, or have any questions regarding the Brand Change, please contact [Dan Fandrey](#).

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## Navigating to the System Providers page on TruStage.com

Our corporate website might look a little different now, but we still have everything you need. To navigate to the System providers page from the TruStage homepage, select 'Learning and planning' from the navigation bar at the top, click 'For businesses', and the 'System Provider resources' will be the list on the list under 'Resources'. Please contact [DP Solutions](#) with any questions.

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## **CMC Flex adds Protection Advisor Expert Connectivity for their mutual clients - you can too!**

We have just completed a project with CMC Flex Juice for Protection Advisor Connectivity. Our current specs offer the basic connections for quoting and retrieving protection product information back into the LOS workflow. They also allow for automation of tasks for Creating documents and Issuing Protection Products. Our new connectivity setups help eliminate 20-25 manual steps for end users. Interested in adding a connection to Protection Advisor Expert for your mutual clients? Please contact [Dan Fandrey](#) for more information and a technical specifications review.

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## **TruStage Solution Lets Credit Unions Offer Insurance Protection to More Members**

60% of consumers worry about not being able to make their loan payments due to unexpected expenses. This has real ramifications for credit unions.<sup>1</sup>

Credit unions can help provide peace of mind to members by offering to protect the member's loan payment in circumstances where the member is unable to manage expenses. These can include an unexpected repair or a total vehicle loss, unemployment, disability, or even death of an earner in a household. In fact, this year 64% of consumers indicated that, if offered, they are likely to get one or more payment protection products along with their loan. This is a significant increase from 2019, when only 38% of consumers indicated they are likely to consider payment protection products.<sup>1</sup>

While the need is high, consumers aren't consistently offered payment protection products. Only 50% of consumers were offered payment protection products on their auto loan, and it was even less on personal loans – with only 30% of consumers being offered payment protection.<sup>1</sup>

TruStage is helping credit unions increase awareness of payment protection products with our digital investments. Our recent survey of credit unions found that 65% of loans are starting digitally, and 10% are funding with no human intervention. Our investments are targeted at increasing member education and making it easier to purchase payment protection products through digital channels. A recent example of this is our integration with MeridianLink to enable payment protection products to be offered as part of the member's digital loan application. This consumer tested design has over 40% of credit union members engaging with payment protection products. Member interest is seamlessly transferred to the loan officer, enabling them to engage in a deeper conversation on member need and product fit. The benefit of this integration into digital channels is that members are made aware of their payment protection offers 100 percent of the time, and it allows lending staff to have more meaningful conversations regarding product fit.<sup>1</sup>

TruStage is in the process of expanding their lending payment protection integration with credit union technology platforms across member-facing loan applications, home banking, financial wellness, and communication platforms.

Would you like to learn more? Are you interested in discussing how our companies can collaborate to bring this integration to your credit unions? If so, please contact [Lance Hardyman](#) or [Dustin Thoren](#).

<sup>1</sup>J.D. Power, 2023 U.S. Consumer Lending Satisfaction Study, May 10, 2023

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## TruStage Quote Connect Refresh

As member preferences continue to shift towards the online channel, we are excited to announce that QuoteConnect has migrated from the loan officer channel to the MeridianLink Portal (online application flow), delivering an end-to-end digital member experience.

### What is QuoteConnect?

QuoteConnect is an important feature of TruStage™ Auto and Home, underwritten by Liberty Mutual®. QuoteConnect seamlessly integrates with your credit union's online auto loan application process making it easier for your members to purchase insurance at the right time and in the channel they prefer.

It conveniently puts your members in contact with Liberty Mutual® Insurance at the time of their online car loan application by simply asking a question. Members who wish to receive a quote are taken directly to LibertyMutual.com and a quote is delivered in real time. They can review coverage, add drivers, and purchase their policy within minutes.

### What is the member experience like with QuoteConnect?

As soon as the member completes a vehicle loan application, they are presented an offer to save money on their insurance by quoting through Liberty Mutual. Members who agree to get a quote are immediately taken to the Liberty Mutual quote experience once their loan application is submitted. All information relevant to the insurance quote is transferred from the loan application to Liberty Mutual directly to save the member time.

If you are interested in learning more about how QuoteConnect can enhance your system's value to credit unions, please contact [Lance Hardyman](#) or [Dustin Thoren](#).

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