

## Corelation Celebrates 15 Years of Partnership and Innovation at 14<sup>th</sup> Annual Client Conference

Corelation’s 14th Annual Client Conference, held May 14 -16, returned to the Manchester Grand Hyatt San Diego, welcoming 1,436 attendees—both in person and virtually—for an extra-special celebration: Corelation’s 15th anniversary. This year’s theme embraced the milestone with a festive Quinceañera, honoring 15 years of innovation, collaboration, and community with flair, color, and plenty of heart.

From the opening session, the energy was high as Corelation leadership welcomed credit union partners, vendors, and Corelation employees to a dynamic two-day experience. Keynote speaker Scott Lesnick, Global Leadership Keynote Speaker, CSP, and author, kicked off the event with an inspiring message on leadership and resilience, setting the tone for a conference centered around growth and perseverance in today’s ever-evolving financial landscape.



Attendees had the chance to dive deep into credit union strategies through a variety of sessions and tracks. A highlight was the always-anticipated Fireside Chat with Chairman and Founder John Landis, CEO Emeritus Theresa Benavidez, CEO Rob Landis, and Chief Innovation Officer Jeff Dent, who shared heartfelt reflections and behind-the-scenes stories from

Corelation’s 15-year journey. Meanwhile, cybersecurity expert Jim Stickley returned with his signature blend of real-world warnings and witty delivery in a lively, interactive session that welcomed audience questions. Later, Mike Kelly of TeamOnUp encouraged participants to think differently with his thought-provoking session challenging the “Merge or Die” narrative, replacing it with a more optimistic—and achievable—vision: “Status Grow.”

The Vendor Showcase buzzed with activity as attendees explored third-party solutions from Corelation’s trusted partners. One credit union, mid-conversion, couldn’t stop smiling—a testament to the positive environment Corelation has fostered. The day wrapped up with a relaxed cocktail reception, giving everyone a chance to unwind and connect.



On day two, participants customized their learning experience by selecting from four targeted tracks. The Executive Track addressed big-picture topics like AI integration, cloud core migration, and managing multigenerational teams. The Operational Track was all about efficiency and innovation, covering everything from escrow analysis and queue management to creative ways credit unions are leveraging KeyInsight.



The Technical Track offered hands-on sessions for IT professionals focused on SQL troubleshooting, Linux optimization highlighted by HAPO Community Credit Union, and authentication flexibility. Meanwhile, the New Client Track provided guidance on everything from data validation to go-live support for those preparing for their first days on KeyStone.

As the conference came to a close, guests gathered for a beautiful closing reception at The Prado at Balboa Park—an elegant, historic venue that provided the perfect backdrop for an evening of celebration. With great food, music, and conversation, the event offered a chance to reflect on how far we’ve come—and where we’re headed next.

Fifteen years of Corelation is more than just a number—it’s a reflection of the strong relationships, shared purpose, and innovative spirit that drive this community forward. Thank you to everyone who helped make this year’s conference unforgettable. Here’s to the next chapter—together. 🍷

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## Note from the CEO

### In Memory of Justin Mecklenborg

Dear Justin,

We missed you at the conference this year, buddy. (And not just because it meant Mike Lawson had to emcee! lol) You would have loved seeing everyone coming together and exchanging ideas and contacts – it was more vibrant than ever. And of course you know we all would have loved to be able to see your big smile too. All your hard work to make the event happen really paid off. And I don't just mean all the planning meetings this year either; your fingerprints can be found all over this company.

Hey do you remember when we used to share an office back on El Camino Real? (You know, the building under the freeway overpass... still too funny.) Whenever we had a private call we'd put a sock on the door like we were college dormmates and Theresa would roll her eyes at us. Or how about when you sat at the cubicle right outside the break room and put little puzzles and games on the edge of your desk so everyone would come by to chat throughout the day? Or oh man – I'll never forget how you would start Client Relations department meetings with little ice-breakers, like who can build a princess puzzle meant for 3yo girls the fastest. You always knew how to put a smile on everyone's face.

You might not have known this, but because you were always bringing such joy to everyone, sometimes people overlooked how hard you worked. I was lucky to have been able to see that side too. How you navigated some really hard client situations as we worked through our growing pains, always with honesty and humility to earn their trust. How you honed your management skills to find the right balance of structure and autonomy for your teams. The unfathomable number of hours you poured into each one of those silly conference videos. How deeply you cared about your colleagues and clients.

Well I hope you know that we still care just as deeply about you. I guess that's why the conference felt a little different this year without you, and I guess it always will. But that's alright, because I know you're in a better place now. (You get a lot less email, for one thing.) We're keeping your family close with our Corelative one, and we'll always bring playfulness and joy to our work like you taught us. Thank you for everything!

Rest Well My Friend,



Rob Landis, CEO, Corelation Inc.





## Employee Spotlight: Mary Barlow, Senior Technical Writer

If you've ever used Corelation's KeyStone Documentation or pored over our release notes, there's a good chance you've benefited from the thoughtful work of Mary Barlow. A long-time team member with a remarkable professional journey, Mary brings a unique blend of creativity, technical expertise, and dedication to everything she does.

Originally from San Diego, Mary explored a range of interests—from campus radio DJ at Grossmont College to hotel management—before discovering her passion for technology, thanks in part to her father's encouragement to try computer programming.

Mary entered the credit union core world over two decades ago and quickly found a passion for learning and problem-solving. When she joined Corelation, she was the sole team member handling all card and interface implementation projects. As the company grew, Mary transitioned into documentation, where she found her stride bringing clarity and consistency to our evolving platform.

In 2017, Mary and her husband Carl (Corelation's fifth employee!) moved to Charlotte, NC, and were thankful to continue working remotely. Since



then, Mary has played a key role in documenting interfaces and creating resources for KeyStone users, including her work on the User Service and Window Service documentation and refining the KeyStone privilege spreadsheets for better consistency and usability.

Mary finds joy in digging into each new software release, learning about enhancements, and ensuring documentation is ready to go. "It feels really good when we have it all in and we're ready for the next release," she says.

When asked what she values most about Corelation, Mary doesn't hesitate: "Corelation is more than a company—it's my second family. The culture here, created by Theresa, John, and Rob, is remarkable. Everyone genuinely cares about each other and takes pride in offering a great product."

Outside of work, Mary and Carl love to travel, especially with hopes of returning to Portugal and Spain. They also enjoy hiking the greenways in Charlotte and cooking for friends and family.

Mary is a true example of how curiosity, adaptability, and a supportive environment can lead to a fulfilling career. We're so lucky to have her on the Corelation team! 🍷

## User Group Community Unites: National Collaboration Hits New Heights in San Diego

This year's Corelation Client Conference wasn't just a celebration of 15 years of innovation—it was also a powerful moment of unity for our KeyStone User Groups across the country. Before the conference officially kicked off, 104 attendees gathered for a special in-person national user group meeting, hosted at the Adams Avenue Theater in San Diego's Normal Heights neighborhood.

Crystal Hegel, System Analyst at True North Federal Credit Union and facilitator for the national group, helped lead the session and shared highlights from this energizing event. "It was exciting to see so many regions come together again in one room—we're really building something special here," shared Hegel.

The agenda included vendor presentations, roundtables on operational efficiencies, and open-floor discussions about the solutions credit unions are using. Rob Landis, Corelation's CEO, was also on hand to welcome everyone and help kick off the session. A standout topic was real-time payments, which sparked thoughtful dialogue and encouraged participants to think beyond their daily operations.



With user group board members from all regions across the country in attendance, the meeting was a chance to foster collaboration, encourage peer-to-peer learning, and give voice to shared goals and opportunities.

"The connections formed—those 'I didn't know that!' moments—are what make these gatherings so valuable," said Hegel.

Looking ahead, the national user group team hopes to keep this momentum going by continuing to host in-person meetings in conjunction with the annual Corelation Client Conference. They also aim to streamline registration processes with Corelation to ensure even smoother coordination in future years.

"The collaboration and open communication between users—and between users and Corelation—are what make these meetings so impactful," added Hegel. "We're grateful for the support of Corelation, our sponsors, and the users themselves. They're the reason we come together year after year."

As the user group community continues to grow, so does its impact—proof that when clients connect, the entire Corelation ecosystem gets stronger.

To participate in a regional [KeyStone User Group\\*](#), reach out to a board member through the contact information available on Confluence or join the conversation in the [community forum](#). 🍷



# Tips & Tricks: KeyBridge API Certification

## Elevating Vendor Development and Integration with Corelation



Corelation's KeyBridge API is a powerful tool, enabling third-party vendors to integrate their solutions seamlessly with the KeyStone core. To ensure optimal performance, reliability, and a superior user experience, Corelation offers a KeyBridge API Certification program.

### The Certification Process: A Partnership for Excellence

The KeyBridge API Certification is a testament to Corelation's commitment to fostering a robust and well-integrated ecosystem around KeyStone. Vendors seeking certification collaborate closely with Corelation's Development Team to certify their developments. This process involves rigorous testing, adherence to best practices, and validation of the vendor's integration to ensure it meets Corelation's standards for performance, security, and functionality. Vendors gain invaluable insights into KeyStone's architecture and the most effective methods for leveraging KeyBridge.

**Benefits for KeyBridge Vendors** - Achieving KeyBridge API Certification unlocks a multitude of advantages for vendors:

- **Streamlined Best Practices for Product Development:** The certification process guides vendors to adopt development best practices tailored for the KeyBridge environment. This ensures efficient development cycles, cleaner code, and ultimately, more robust and reliable products.
- **Enhanced Marketing & Credibility:** Credit unions increasingly seek out certified vendors, recognizing them as trusted partners who have undergone thorough validation and earned Corelation's "seal of approval".
- **Meeting Client Expectations:** Certification demonstrates a vendor's commitment to quality and seamless integration, aligning with the expectations of forward-thinking financial institutions.
- **Reduced Number of Client-Reported Issues:** Certified integrations are built with a strong emphasis on stability and minimizing potential issues and inconsistencies. This proactive

approach leads to a significant reduction in the number of support tickets raised, saving the vendor time and resources while enhancing client satisfaction.

- **Optimized API Usage and Reduced API Calls:** Working closely with Corelation's development team, vendors learn how to optimize their API calls, reducing unnecessary requests and improving overall system performance for both the vendor's application and the credit union's KeyStone system. This efficiency translates to faster response times and a more streamlined user experience.

**Benefits for Credit Unions** - The benefits of KeyBridge API Certification extend beyond the vendors. Credit unions leveraging certified solutions can expect:

- **Greater Confidence in Integrated Solutions:** KeyBridge Certification provides credit unions with the assurance that the integration has been rigorously tested and validated by Corelation.
- **Smoother Implementations and Upgrades:** Certified integrations are designed to align with KeyStone's architecture and best practices, leading to smoother implementation processes and easier upgrades.
- **Improved System Stability and Reliability:** By minimizing integration issues, certified solutions contribute to a more stable and reliable environment overall.
- **Enhanced Member Experience:** Ultimately, the focus on quality and efficiency translates to a better experience for credit union members.

By encouraging and supporting vendors in achieving certification, Corelation fosters a community committed to excellence, benefiting vendors through enhanced credibility and streamlined development, and empowering credit unions with reliable, efficient, and well-integrated solutions that ultimately serve their members better. 📌

## Upcoming Training & Seminars

For the full list of upcoming Corelation trainings and to register for courses, [click here](#). (Confluence access required)

### Participation Loans

July 24<sup>th</sup>  
12-1pm PST

### Posting Policies

August 27<sup>th</sup>  
12-1pm PST

### Disputes

September 25<sup>th</sup>  
12-1:30pm PST

### **NEW** eLearning Series: Highlights of the KeyStone Database

Announcing a brand-new self-paced eLearning series, designed to help you confidently navigate KeyStone. [Learn More & Get Started Here](#)

## Back-Office Technical Training

### KeyBridge Training

August 12-13 • September 16-17

### UI Scripting Training

August 19-21 • September 23-25

### Beginner Reports Training

July 22-24 • August 5-7  
• September 23-25

### Batch Scripting Training

July 1-3 • August 5-7  
• September 2-4

### Advanced Reports Training

July 8-10

### KeyStone Server Administration

September 16-17

## Interested in Custom Training?

Our Technical Training & Education Services both offer custom training, available virtually or in-person!

### Custom Technical Training

Choose a targeted list of technical topics from our available courses to determine your curriculum.

[Learn more](#) (Confluence access required)

### Customized Training with Education Services

Select from our catalog of prepackaged sessions or let us create something unique for your credit union.

[Learn more](#) (Confluence access required)



## Corelation Client News & Success



Simplicity Credit Union has been awarded the [2024 Governor's Financial Literacy Award](#), an honor presented by Governor Tony Evers and the Governor's Council on Financial Literacy and Capability. This recognition highlights their exceptional efforts to build financial confidence in the community. From operating in-school branches in Loyal, Marshfield, and Stevens Point to delivering fun, age-appropriate classroom lessons, Simplicity CU is making financial education approachable and meaningful—empowering both current and future members to make smart money decisions. Congratulations, Simplicity CU!



ValleyStar Credit Union held its annual all-team meeting on January 25th, at The New College Institute in Martinsville, VA. In addition to sharing business updates and future plans, the event featured a charitable team-building activity where employees assembled and donated 27 bikes—25 built on-site and 2 additional boxed bikes—to the local Boys & Girls Clubs. Teams also created and pitched mock marketing campaigns for their bikes, making it a creative and impactful day of giving back. Check out some more [photos from the event here](#).



## Welcome, New Clients

(Through June 4, 2025)

**The New Orleans Firemen's  
Federal Credit Union**  
\$276 million in assets  
Metairie, LA



NEW ORLEANS  
**FIREMEN'S  
FEDERAL**  
CREDIT UNION

**Tonawanda Valley  
Federal Credit Union**  
\$157 million in assets  
Batavia, NY



**Great Erie  
Federal Credit Union**  
\$146 million in assets  
Orchard Park, NY



**CEFCU**  
\$8.3 billion in assets  
Peoria, IL



# PSECU<sup>SM</sup>

Congratulations to PSECU on earning two significant honors! For the third year in a row, PSECU has been named a **Best-in-Class Employer** by Gallagher, recognizing its strong commitment to employee well-being, growth opportunities, and a culture of support. In addition, PSECU has secured a spot on **PA Business Central's Top 100 Organizations** list for the ninth consecutive year. This distinction reinforces its leadership as Pennsylvania's premier digital-first credit union advancing financial innovation, supporting economic growth, and making a meaningful impact across the communities it serves.



## New KeyBridge Certified Vendors

(Through June 4, 2025)



ME Financial



eCU Technology



CenturionCARES

# MANTL

MANTL



Ciphertext Solutions

## Preferred Partner Spotlight: Sync1 Systems

### The Future of Lending Isn't Coming — It's Already Here. Are You Ready?

By Steve Maloney, CEO, Sync1 Systems • For a full list of Corelation partners, [click here](#).

In a world where members can get groceries, stream entertainment, and hail a ride with a tap, they now expect that same ease from their credit union, especially when it comes to lending. Waiting days for a loan approval? That's no longer acceptable. Today's members want answers in minutes and funds in hand just as fast.

But too often, outdated loan origination systems slow down the process with clunky workflows, limited integrations, and delayed decisioning, hurting both member experience and credit union growth.

As lending becomes more competitive, credit unions must embrace platforms built for speed, automation, and adaptability — without sacrificing compliance or control.

That's where **Sync1 Systems** leads the way.

Founded by credit union veterans and owned by credit unions, Sync1 was built to empower the industry — not compete

with it. Sync1's 100% cloud-based Loan Origination System is designed to streamline the entire lending process, from application to funding, with features like:

- Real-time auto decisioning
- No-touch funding that puts money directly into member accounts
- Lightning-fast implementation and full configurability
- A modern REST API that plays well with your core and digital tools
- Pay per funded loan only

The result? Credit unions using **Sync1** are reducing friction, funding loans faster, and delivering experiences that feel effortless — just the way members expect them.

It's not just lending. It's lending done right. 🏠



## 2025 EXECUTIVE FORUM

*Save the Date*



November 6-7, 2025



InterContinental San Diego





# Thank You, Conference Sponsors

We'd like to recognize our partners who generously supported the 2025 Corelation Client Conference.  
Thank you for your support!

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## Conversiongram



Memorial CU Smiles for a Selfie



CU of Denver Conversion Team



Stellar Core Theme Conversion at APL FCU



Kona Ice Truck Break for Four Points FCU



All Smiles at Red River CU



Affinity Credit Union Team!



The Whole Gang at APL Federal Credit Union



United Consumers Credit Union Team Poses with Kansas City Chiefs Coach!



CU of Denver Executive Team



Aloha from Memorial CU



Red River CU Hard at Work



United Consumers CU Conversion Ready



Four Points FCU Having Fun Validating

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