



Media Contact

Jill Faucher

(858) 769-7578, jfaucher@ccu.com

North Island Credit Union Launches Remote Advisor Center to Expand Retirement & Investment Service Channels

Digital Technology Platform Delivers Full-Spectrum Remote Financial Planning Services

San Diego, CA – November 13, 2018 – North Island Credit Union has launched a new Remote Advisor Center, delivering full-service retirement & investment solutions through an advanced technology platform. Opened in response to member interest in electronic services, the Remote Advisor Center offers a full spectrum of financial planning services via secure technology channels, without the need to conduct business in person.

“We’re always looking to improve personal service for members in ways that work best for their schedule, lifestyles and preferences. Many members now prefer to access and manage their retirement and investment accounts and goals remotely through digital channels. We’ve been able to use secure technology systems to provide the same level of personal service without the need to schedule time and travel to meet in a credit union branch,” said Carl Federici, VP, Investments & Insurance, North Island Credit Union.

“The Remote Advisor Center is an extension of our in-branch services, where members will always be able to meet with their advisors in person. This service offers another way for members to meet with a highly qualified financial advisor, moving the face-to-face experience to a secure, private screen-to-screen experience from wherever members prefer to be,” Federici noted.

Remote advisors provide the credit union’s full spectrum of services, including retirement and financial planning, wealth management, estate planning, tax strategies, education planning, and insurance services. Leveraging technology, Remote Advisor Center sessions are conducted via smartphone or computer videoconferencing, and transactions use secure document transfer and other web-based tools.

North Island Credit Union’s Remote Advisor Center will be led by Financial Advisor Ryan Davis. Fully licensed in securities and life insurance, Davis has served as a member service representative, financial advisor associate, and financial advisor in his six years with the credit union. Bringing a unique combination of financial planning, member service and technology skills to the role, Davis already has seen significant member interest in the new offering.

Federici continued, “Our branches will always be important. To complement our retail locations, we’re continually asking members how they want to be served in their financial planning needs -- not just today, but in the years ahead. We’re excited to offer these new capabilities as an added convenience for members.”

About North Island Credit Union, a division of California Credit Union

California Credit Union is a federally insured, state chartered credit union founded in 1933 that serves public or private school employees, community members and businesses across California. With more than 165,000 members and assets of \$3 billion, California Credit Union has 24 branches throughout Los Angeles and San Diego counties. The credit union operates in San Diego County as North Island Credit Union, a division of California Credit Union. California Credit Union offers a full suite of consumer, business and investment products and services, including comprehensive consumer checking and loan options, personalized financial planning, business banking, and leading-edge online and mobile banking. Please visit northisland.ccu.com for more information or follow the credit union on Instagram® or Facebook® @northislandcu.

#