



## Finex Credit Union

Finex is a credit union. They are a cooperative, not-for-profit financial institution owned by their members. The purpose of a credit union is to use its income to provide affordable, quality products, and services to members. True to their credit union roots Finex is committed to the communities we serve. They work hard to enrich the quality of life for others. Finex is proud to be leading the charge for what it means to be a credit union in the 21st century.

### DEMOGRAPHICS

- **INDUSTRY** | FIN-TECH
- **HEADQUARTERS** | E. HARTFORD, CT
- **FOUNDED** | 1938
- **EMPLOYEES** | 50+
- **EXISTING ERP** | QUICKBOOKS
- **OTHER SYSTEMS** | JACK HENRY, CMC FLEX, PEO PRESTIGE, ADP, VIZO CORPORATE CU

### SALES TEAM

- **NETSUITE** | JACK TELLER, ALEX WARREN
- **CARAVEL** | CAILA COHEN, SCOTT CURRY

### NETSUITE SOLUTION

- **NETSUITE** | FINANCIALS
- **MODULES** | RECORD TO REPORT, ACCOUNTS PAYABLE
- **INTERFACES** | BANKING, PAYROLL, JACK HENRY, CORE SYSTEM

### IMPLEMENTATION

- **TIMELINE** | 2 MONTHS
- **METHODOLOGY** | SUITE SUCCESS + OPTIMIZATION
- **APPROACH** | FINEX WILL DEPLOY NETSUITE IN A MULTI-PHASE WITH CORE FUNCTIONALITY GOING LIVE IN MONTH 1 AND INTEGRATING TO VARIOUS 3RD PARTY SYSTEMS IN PHASE 2

