



2027 Pricing Guide

Pricing effective 01/01/2027

Contact Center

Product / Service	One-time Fee	Ongoing Fees
Branch XT: Inbound Calls	\$1,815	\$105/month administrative fee \$4.45/call Monthly minimum based on asset size or 90% of previous six-month average; whichever is greater Asset Size Minimums: Up to \$200M \$260 \$201M-\$500M \$360 \$501M-\$750M \$520 \$751M+ \$1,035
CBX or Sync1: Loan Support	\$1,815	\$105/month administrative fee \$4.45/call \$4.65/application \$7/booked loan Monthly calls minimum of \$65 or 90% of prior six-month average; whichever is greater.
Web Chat	\$1,550	\$105/month administrative fee \$3.50/chat Monthly minimum of \$105 or 90% of prior six-month average; whichever is greater \$3.35 / outbound call
Branch ST: Outbound Calls	\$1,550	\$105/month administrative fee \$3.65/call Asset-size based monthly minimum: Up to \$300M \$31 \$300M+ \$55
Disaster Recovery Support	\$1,550	\$45/month retainer \$3,625/declaration + \$1,550/weekly premium after 5 business days \$5.70/call
Contact Unlimited	Starting at \$1,550	Quote provided
CBX Conversion Support - Inbound	Starting at \$1,550	Quote provided
CBX Conversion Support – Outbound	Starting at \$1,550	Quote provided
Special Project	Quote provided	Quote provided

Marketing & Analytics

Product / Service	One-time Fee	Ongoing Fees
Member Reach Emails	\$1,800	\$375/month \$0.025 / email
HTML eStatement Notifications Emails	\$600	\$75/month \$0.025 / email \$25/month promo refresh - optional
New Member Onboarding Emails	\$1,800	\$375/month \$0.025/email
Journeys Emails	Starting at \$1,800	\$375/month per Journey \$0.025/email
Single Send Messages Emails	\$120	\$0.025 / email
Custom Campaigns – Emails, Outbound Calls, Print, and More!	Starting at \$480 or \$1,440 annually for RevGen	\$0.025 / email \$3.50/call Print/postage: quote provided
RevGen Campaigns – Emails, Outbound Calls, Print, and More!	\$1,440 annually	\$0.025/email \$3.35/call (<600 calls) \$3.50/call (>600 calls) Additional channels: quote provided
Letter Check	\$1,035	Print/postage: quote provided \$0.025 / email
Social Media Management	\$1,000	Self Service – Starting at \$150/month Xtend Managed – Starting at \$450/month
Communications Platform Management	\$350.00	\$75/user/month \$0.025 / email
Call Center Scorecard	\$105	\$85/month
Marketing Scorecard	\$105	\$85/quarter
Social Media Scorecard	\$129	\$129 / month
Losing the Love Emails	\$650	\$340/month \$0.025/email
Losing the Love Enhanced Reporting	\$776	\$200/month
New Member Reporting	\$518	\$150/month
Member Survey Program	Quote provided	Quote provided
Custom Analysis	n/a	\$105 / hour
Email Performance Analysis	n/a	\$1,035 / analysis
Sales Tools Crash Course	\$776-\$1,035.00	n/a

Bookkeeping & Mortgage Servicing

Product / Service	One-time Fee	Ongoing Fees
Daily Service - Exceptions	Starting at \$1,550	Starting at: 0-1k members: \$35/week 1k-10k members: \$60/week 10k-25k members: \$125/week 25k-75k members: \$250/week 75k-200k members: \$500/week 200k-300k members: \$995/week
Basic Daily Service - General Ledgers	Starting at \$1,550	Starting at: \$0-\$10M: \$75/week \$10M-\$50M: \$100/week \$50M-\$150M: \$140/week \$150M-\$300M: \$190/week \$300M-\$500M: \$255/week \$500M-\$1B: \$345/week \$1B-\$2B: \$460/week \$2B-\$3B: \$605/week
Advanced Daily Service - General Ledgers	Starting at \$1,550	Starting at: \$0-\$10M: \$150/week \$10M-\$50M: \$240/week \$50M-\$150M: \$375/week \$150M-\$300M: \$550/week \$300M-\$500M: \$765/week \$500M-\$1B: \$1,075/week \$1B-\$2B: \$1,470/week \$2B-\$3B: \$1,955/week
Basic Monthly Services	Starting at \$1,550	Starting at \$0-\$10M: \$60/week \$10M-\$50M: \$100/week \$50M-\$150M: \$150/week \$150M-\$300M: \$215/week \$300M-\$500M: \$285/week \$500M-\$1B: \$380/week \$1B-\$2B: \$555/week \$2B-\$3B: \$740/week
Advanced Monthly Services	Starting at \$1,550	Starting at: \$0-\$10M: \$115/week \$10M-\$50M: \$185/week \$50M-\$150M: \$280/week \$150M-\$300M: \$390/week \$300M-\$500M: \$515/week \$500M-\$1B: \$680/week \$1B-\$2B: \$985/week \$2B-\$3B: \$1,310/week
Stand-In Support - Retainer Fees	n/a	\$0-\$500M: \$85/month \$500M+: \$105/month
Basic Stand-In Support - Exceptions	Starting at \$1,550	Starting at: 0-1k members: \$35/day 1k-10k members: \$60/day 10k-25k members: \$105/day 25k-75k members: \$155/day 75k-200k members: \$220/day 200k-300k members: \$290/day

Product / Service	One-time Fee	Ongoing Fees
Advanced Stand-In Support	Starting at \$1,550	Starting at: \$0-\$10M: \$75/day \$10M-\$50M: \$100/day \$50M-\$150M: \$140/day \$150M-\$300M: \$190/day \$300M-\$500M: \$255/day \$500M-\$1B: \$350/day \$1B-\$2B: \$460/day \$2B-\$3B: \$605/day
5300 Call Report Services	Starting at \$3,260	Starting at \$655/quarter
5300 Call Report Setup Services	Starting at \$2,610	n/a
CBX Conversion Support	Starting at \$1,550	Quote provided
EFT Plastic Support	Starting at \$650	Quote provided
Bookkeeping Research & Special Projects	n/a	\$105 / hour
Lockbox Servicing	\$3,105	\$285 / month \$0.95 / item
Investor Reporting & Escrow Administration	Quote provided	Quote provided
Portfolio Conversion	Quote provided	Quote provided
Investor Reporting (standard participation)	Quote provided	Quote provided

Partner Services

Product / Service	One-time Fee	Ongoing Fees
Xtend Shared Branching	\$1,035 Expedited add-on: \$500	\$925/year
Deposit and Loan Participation	Basic Publication: Free Advanced Publication: Quote provided	n/a
On-site Consultations	Quote provided	Quote provided

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