Xtend

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 $3.25 to $3.40/call Print/postage: quote provided
RevGen Campaigns – Emails, Outbound Calls, Print, and More!	$1,440 annually	$0.025/email $3.25/call (<600 calls) $3.40/call (>600 calls) Additional channels: quote provided
Letter Check	$1,035	Print/postage: quote provided $0.025 / email
Social Media Management	$1,800	Starting at $1,200/month Current portal clients: $150 or $450/month
Communications Platform Management	$350	$75/user/month $0.003 / email you send
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	$350	$200/month
New Member Reporting	$600	$150/month
Member Survey Program	$1,500	$350/month + $0.025/email
Custom Analysis	n/a	$150 / 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

info@xtendcu.com | xtendcu.com