

# Improving Business Partner Relationships

**SECU Leverages EVERFI’s Financial Education to Connect with Members and Businesses**

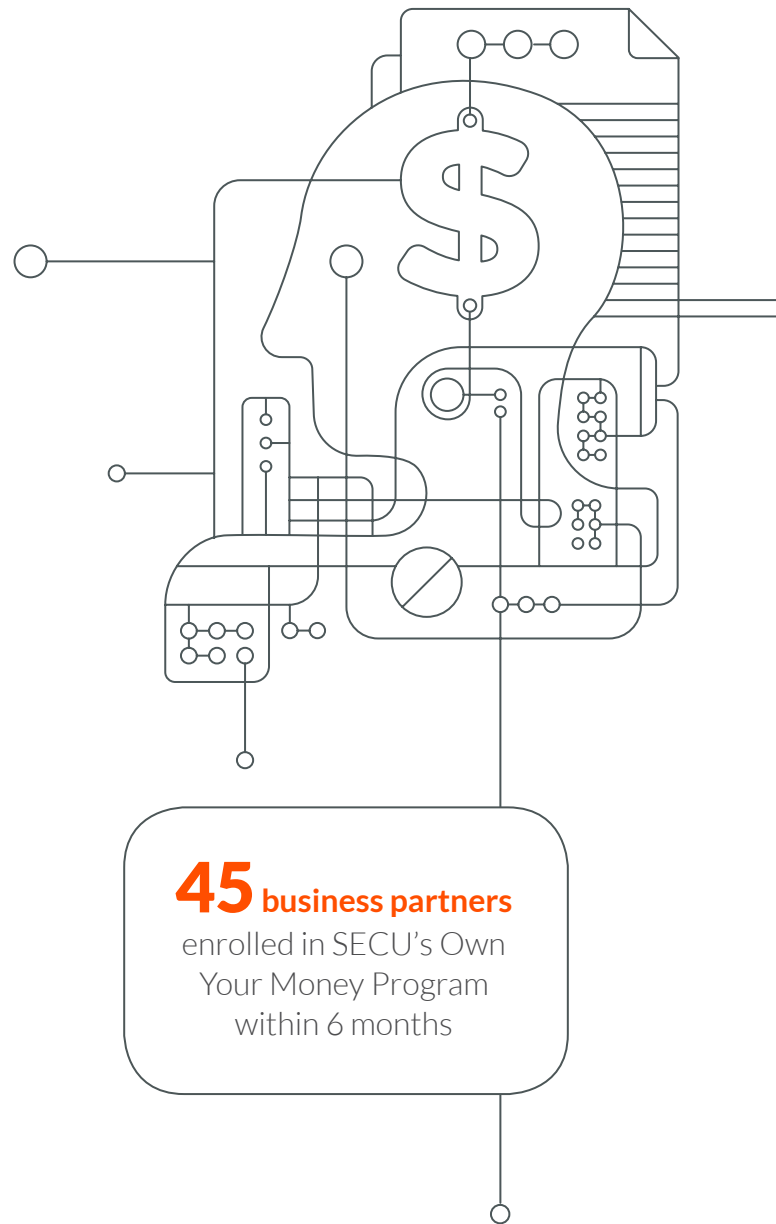
## The Problem

As a credit union built upon giving back to its community, Baltimore-based SECU understood the importance of education to improve the financial wellness of their members and expand their offering to business partners. SECU recognized that in order to help them deepen their business relationships and differentiate their financial education offering for their members and business partners, they needed to replace their existing solution. With limited resources for an internal development of educational content, they needed a partner to help them roll out a financial education program quickly and seamlessly—with content that would resonate with and benefit their members and business partners.

## The Process

It was EVERFI’s rich financial content, easily accessible through online and mobile channels, that first grabbed the attention of SECU leadership. “EVERFI was already creating great educational materials—and we could harness that content,” says Cassie Costin, SECU Community Market Leader. “Why reinvent the wheel?”

For Jullyenne Antunes, Community Outreach Specialist, another positive was that the content could be leveraged for both internal and external purposes. “Capitalizing on EVERFI’s existing modules lets us better utilize our own resources,” she says, adding that the credit union also uses the content to educate and train their employees.



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**Why reinvent the wheel?”**

**Cassie Costin**

Cassie Costin, SECU Community Market Leader

With the help of custom-branded welcome kits packed with flyers, templates, and intranet resources, SECU launched their “Own Your Money” program—promoting it via email and their newsletter. They offered the educational program to their members as well as to local businesses and universities—who could, in turn, educate their own employees and students.

## The Result

The program has yielded impressive results in a short time. Within three months of the program launching in 2017, SECU met their initial goal of signing up 15 businesses that wanted help educating their employees and addressing the critically-needed financial wellness benefit. Within 6 months, they signed up 45 business partners to roll out financial education programs through SECU. These numbers showed SECU that financial education could be the key to unlocking new relationships with business partners and deepening the offerings they have for them.

The results were also, in part, due to SECU’s and EVERFI’s flexible implementation. “Some partner companies use the program directly on an intranet,” says Melinda Burke, a Member Advisor at SECU. “For others, we also offer personal workshops around two or three online learning modules. It’s simple to adapt EVERFI’s content for in-person learning.”

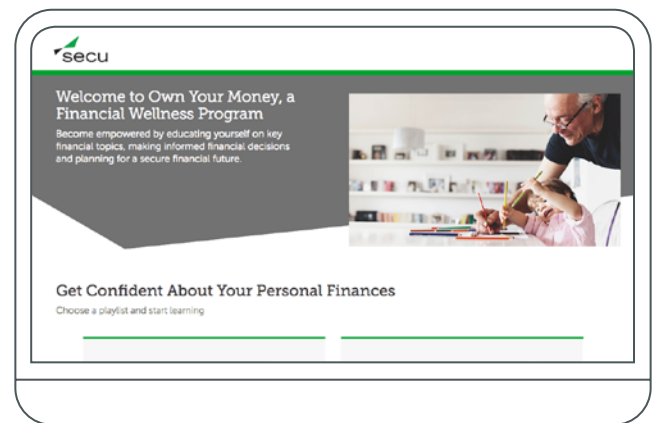
This simplicity and flexibility translates to younger learners as well, as SECU also offers financial education for college and high school students. “EVERFI’s learning really works for everybody—and every attention span,” adds Jeanne Lay, SECU Special Programs Coordinator, “because it can be offered in small 2- or 3-minute segments with built-on online activities.”

Today, SECU leadership sees the “Own Your Money” program as so closely aligned to the credit union’s vision, that it’s become part of a holistic way of connecting with their community—and a powerful business differentiator. “Businesses don’t want another bank or credit union trying to sell to their staff,” says Costin, “but the difference with us is that we’re offering free education. It’s a real value—one they can pay forward. It’s important for us to lead the way with financial education—and it benefits everyone involved.”

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EVERFI, the leading education technology company, is used by over 730 of the world’s largest financial institutions to strengthen their education solutions through an interactive, scalable, and measurable tool that impacts learners at scale. EVERFI powers a network of over 20 million users with best-in-class digital learning platforms that have impact in increasing the financial capability of consumers, employees, business partners and communities.

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