

## Client Overview

### Industry

Credit Union

### Profile

An established federal credit union with multiple branch offices providing an array of financial services to its large member base.

### Situation

Seeking a low-risk and cost-effective method for providing more value to its members.

### Solution

Implementing Probate Finder OnDemand creates an automated process that identifies deceased accounts, finds estates, and files more claims while maintaining positive member relationships.

### Benefits

- Recover debt and reinvest returns
- No survivor contact necessary
- Mitigate compliance risks
- Scalable and cost effective
- Enhance member relationships

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**For more information**

**Call: 1.888.423.0522**

**Or visit us**  
**[www.probatefinder.com](http://www.probatefinder.com)**

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## Credit Union Adds Value to Membership Using Probate Finder OnDemand™

### Situation

A member-service driven federal credit union was looking for ways to provide greater value and competitive rates to its member base. They understood that probate could help them rightfully recover deceased debt, but they were faced with limited resources and concerned about potentially high costs and risks.

As with most not-for-profit credit unions, their primary concern was keeping their member base satisfied while still being able to recover on deceased debt without putting their reputation and relationships at risk.

The company was seeking a scalable and cost-effective solution that would help them maintain positive member relationships, require only limited resources, and provide a positive return on investment that could be reinvested back into the business to enhance its member services.

They attended a no-obligation Probate Finder OnDemand product demonstration to learn more about how the product and the probate process could meet their various needs. Soon after, the Probate Finder OnDemand team implemented an application training program to help them craft their initial strategy.

### Solution

Once the decision was made, Probate Finder OnDemand was immediately implemented and the company began loading accounts and calculating return on investment.

Probate Finder OnDemand allowed them to cost-effectively recover on deceased debt while maintaining positive relationships by eliminating contact with surviving family members.

They continue to place all of their accounts with Probate Finder OnDemand as a low-cost and survivor-sensitive way to recover on their deceased accounts. Recoveries are reinvested in the credit union in the form of higher savings yields, lower loan rates, lower fees and enhanced services for its membership.

### Results

Probate Finder OnDemand has delivered the following results for their business:

- Over \$500,000 in filed claims
- ROI of 369% on fees and growing
- Settlements received in first two months paid for first year of service
- Profits to reinvest in the business for enhanced member relationships