

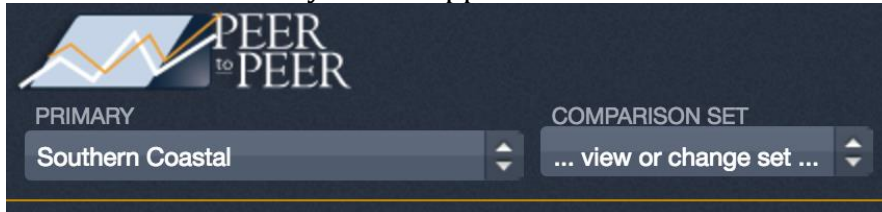
Link to Peer-to-Peer - <https://cloud.p2psoftware.com>

Link to recording of the webinar -- <http://callahanvideos.vzaar.me/11193857>

**Jump ahead to specific segments of the webinar using the time parameters in *italics* below!**

Setting Your Primary – *4 minutes 7 seconds*

- Locate “Primary” in the upper left hand corner

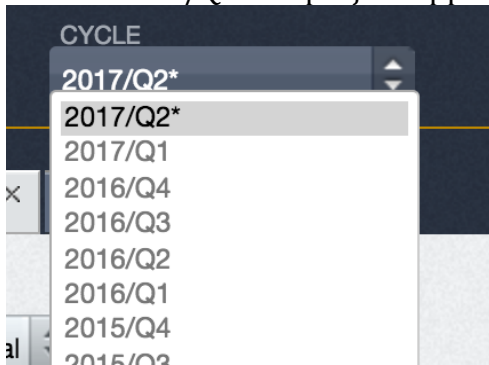


Locating Your WCMS Project Folders – *5 minutes 20 seconds*

- “Key Ratios & Hot Topics” → “WCMS Projects”
  - o “WCMS Project I (2017)” = current Project I students
  - o “WCMS Project I (2016)” & “WCMS Project II” = current Project II students

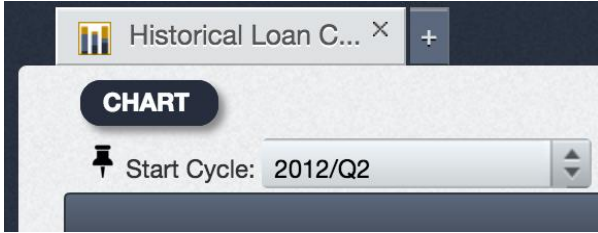
Setting Your End Cycle – *7 minutes 20 seconds*

- Always make sure your cycle is set to “**2017/Q2**”. Once 3Q data becomes available Peer-to-Peer will default to “2017/Q3”. You must change it back to “2017/Q2” for project-appropriate analysis.



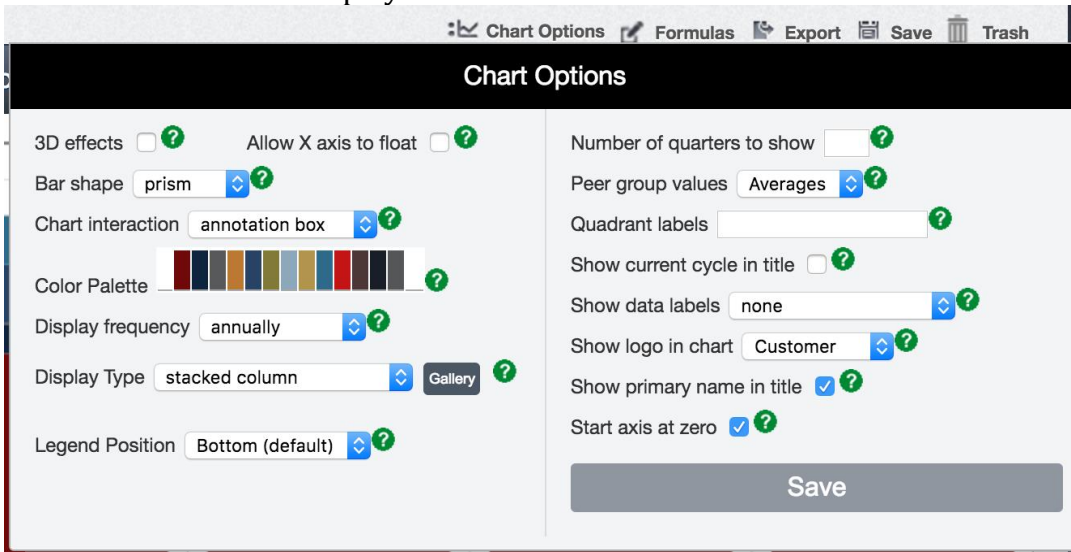
Setting Your Start Cycle & Using the Pin – *9 minutes 27 seconds*

- Set your start cycle to “**2012/Q2**” & set the Pin to a vertical position
- **Please note: later in the webinar, we make a mistake and say you should set your start cycle to “2013/Q2”. That is incorrect. Your start cycle should always be “2012/Q2”.**

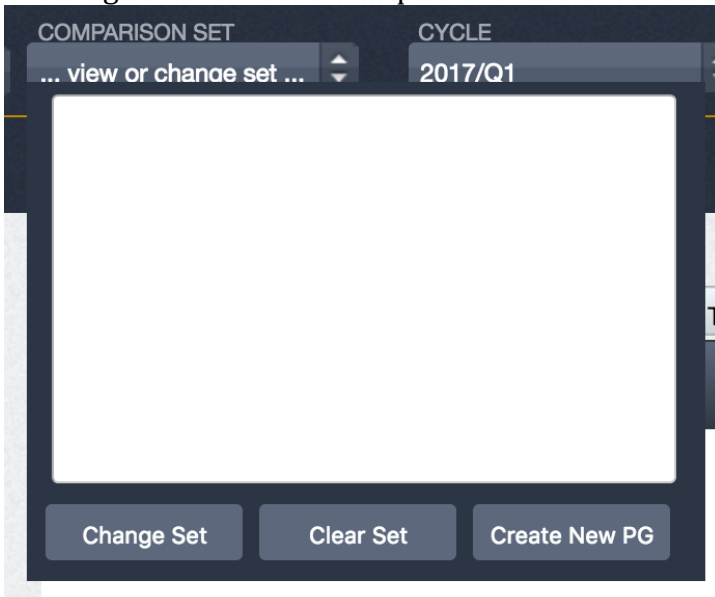


Setting Chart Frequency to “Annually” – 10 minutes 35 seconds

- Display frequency = Annually
- Click “Save”
- Select “For All Displays”



Building a Custom Peer Group – 12 minutes 46 seconds

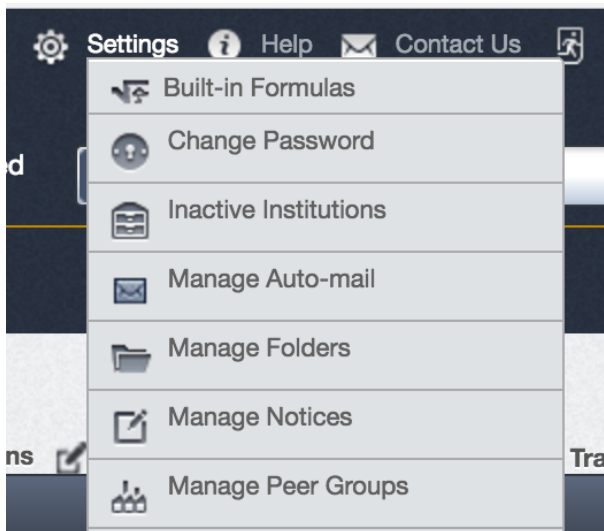


- The criteria tabs you can customize are:

- **Financials:** You can specify any financial criteria, from assets or liabilities to more complex formulas. You're able to search for the formula you want, specify by account code, or add your own formulas.
- **Geography:** Include or exclude institutions on the NCUA region, state, and county level. You can select geographic conditions to include institutions whose headquarters are in your selection, which have at least X number of branches in your selection, or X percent of their branches in your selection.
- **Charter/FOM:** Customize your peer group by including only institutions with a specific charter type or types and or certain fields of membership.
- **Top/Bottom:** Specify that you'd like to include institutions that are in top or bottom X (your input) number or percent in the financial metric of your choice. In addition to top or bottom, you can also have the system select the number or percent of institutions closest to your primary institution. For example: The top 10 percent of credit unions in \$ Employee Compensation & Benefits.
- **Vendors:** You're able to select credit unions that use specific vendors and can choose multiple combinations of vendor service areas. For example: You can set it to include credit unions who use Clifton Larsen Allen for auditing AND use Fiserv for debit pin processing.
- **Include/Exclude:** The include exclude tab is your opportunity to add or subtract institutions to the peer group to hone it beyond your criteria selections. You can upload a list of charter numbers to exclude or search for institutions and manually include or exclude them.

Manage Your Peer Groups – *31 minutes 27 seconds*

- "All Credit Unions in the U.S." = Your Project I Peer Group



Question & Answer Period – *33 minutes 30 seconds*