

The Facts



Core Competency	System evaluation, selection, contract negotiations, and conversion management specialists	
Headquarters	6000 Metrowest Boulevard Suite 107 Orlando, Florida 32835	407-926-8250 www.NextStepInc.com LinkedIn: Next Step International, Inc.
Leadership Team	Peter Jeye, CEO (23 years) Linda Vick, Executive VP (23 years)	Trisa Wetzel, Executive Director (23 years) Steve Wildman, Managing Director (6 years)
Industries	Credit Unions Community Banks	
Market Position	Premium provider and leader since 1995	
Emphasis	Core Operating Systems Digital Banking Solutions Loan Origination Systems ATM / Debit Processing Solutions	Credit Card Processing Solutions Financial / Accounting Systems Digital Imaging Systems Other Key Ancillary Systems
Services	<p>Project Management, Risk Management, and Advisory Services for:</p> <ul style="list-style-type: none"> ▪ Strategic Technology Assessments ▪ Vendor / System Evaluations and Selections ▪ Vendor Contract Negotiations ▪ Conversion and Implementation Management, including Mergers and Acquisitions ▪ High Impact Process Improvement and System Utilization 	
Characteristics	<ul style="list-style-type: none"> ➤ Specialists with a combination of vendor and banking experience ➤ Extremely knowledgeable of banking and credit union operations and management ➤ Thorough understanding of technology vendor landscape ➤ Comprehensive, customized, and 100% objective ➤ Practical and trusted with a proven track record of successful conversions 	
Client Examples	American Airlines Credit Union, TX United Nations Federal Credit Union, NY Investors Bank, NJ Navy Army Community Credit Union, TX Liberty Bank, CT Premier America Credit Union, CA Indiana Members Credit Union, IN Bank Iowa, IA Montecito Bank & Trust, CA Whatcom Educational Credit Union, WA Guilford Savings Bank, CT	Metro Credit Union, MA Harvard University Employees CU, MA Fairfield County Bank, CT Ascend Federal Credit Union, TN Georgia's Own Credit Union, GA Ridgewood Savings Bank, NY Allegacy Federal Credit Union, NC Farmington Bank, CT Andigo Credit Union, IL One Nevada Credit Union, NV Navigant Credit Union, RI
Client Satisfaction	Exceptional	