

# WHERE AND HOW TO ACCESS ALL THINGS CALLAHAN

CALLAHAN  
ASSOCIATES  
the credit union company



Please bookmark and/or print the following guide to help you remember how to access all of Callahan.

If you are not able to access some resources due to your client level, please call us (800.446.7453) to discuss whether an upgrade to a higher subscription level may be right for your organization's needs.

To determine your client level, log in to your Client Portal or CreditUnions.com "Account" page using the instructions below.

**YOUR CLIENT PORTAL**

**My Credit Union's Subscriptions**

Content Subscription Type: **Leadership**

Content Subscription Expiration: 05/31/2026

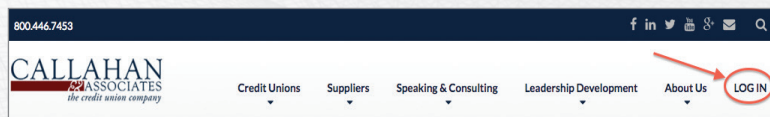


## To Log In (3 Options):

**1)** Type in Callahan.com/client-portal to your browser (be sure to bookmark the page for later reference!).

**Note:** If you are a new user under an existing Callahan client subscription, you can register for access to our resources using the popup you'll encounter here, or do so on CreditUnions.com.

**2)** Go to Callahan.com and click "Log In" along the top navigation.



**3)** Go to CreditUnions.com, log in on that homepage, and click either:

• "My Subscription" along the top left navigation

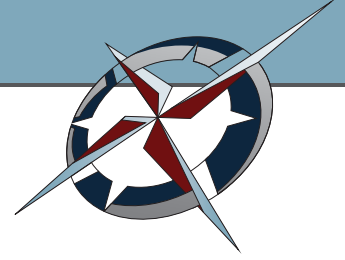


• "Portal" under your name in the upper right corner



**Note:** You can also jump back and forth easily from the Client Portal page and the CreditUnions.com homepage by using the top right navigation tabs when logged in.





# CREDITUNIONS.COM

(All Clients)

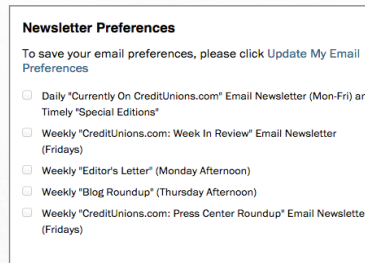
## To Register/Log In

If not registered, start with the “Register” link at the top right of the homepage. Registered users should use the login box at the top right of the homepage (here you’ll also find the option to retrieve a lost password). Make sure the “Remember Me” box is checked if you want to avoid having to log in each time you return to the page or click a link from our emails.



## To Subscribe To Emails

1. Click “Account” at the top right of the homepage. Scroll down to Newsletter Preferences and click “Update My Email Preferences.”
2. Check the box for any emails you are interested in receiving.
3. Click “Save” and enjoy!



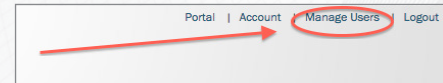
## Updating Preferences And Company Information

Click the “Account” link on the top right of the homepage. Here, you can edit the following items:

- Account Information (including name, email address, and phone number)
- Company Information (including your company administrator, mailing address, and phone number)
- Personal Subscription Information (including email preferences and email newsletter registration)

## Admin Rights

Whether you are on the CreditUnions.com homepage or your Client Portal, if you are your company’s admin, you’ll see an additional “Manage Users” link next to the “Account” link on the homepage. Use this feature to add, change, or remove user permissions for your organization and sign your entire team up to receive our emails so they don’t miss out!



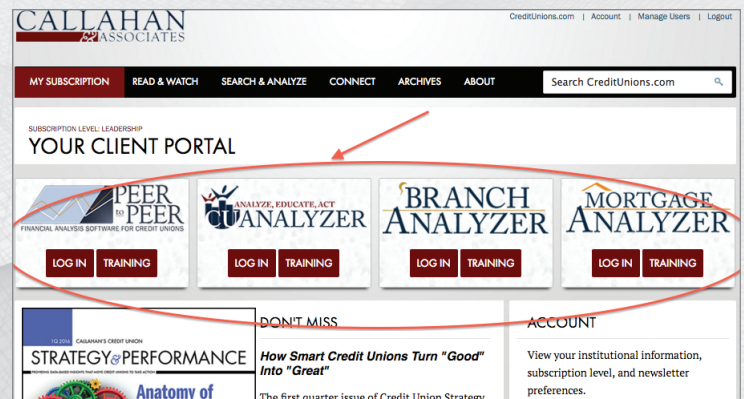
# CALLAHAN ANALYTICS

(Membership And Leadership Only)

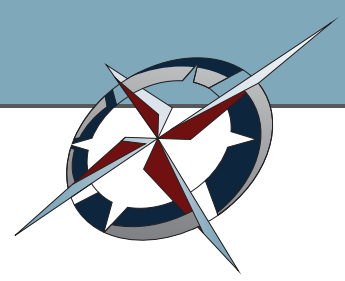
## Log in to your Client Portal to access.

All of our analytics tools (Peer-to-Peer, CUAnalyzer or CUTarget, BranchAnalyzer, MortgageAnalyzer) are linked along the top of this page.

**Note:** Supplier Partners will have access to CUTarget while Credit Unions clients will have access to CUAnalyzer.







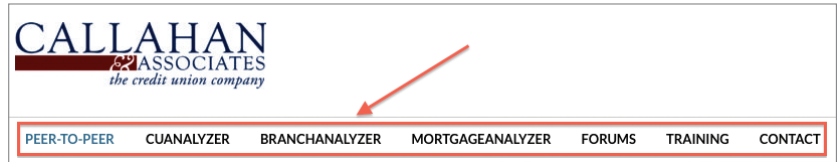
## CALLAHAN ANALYTICS SUPPORT AND TRAINING

(Membership And Leadership Only)

Visit [www.callahan.com/support](http://www.callahan.com/support) to access.

From this homepage, use the top navigation to:

- Browse through individual, platform-based libraries of how to's, tips, and tricks for all skill levels
- Participate in user forums
- Register for live training sessions
- Receive tech support or contact us with other questions

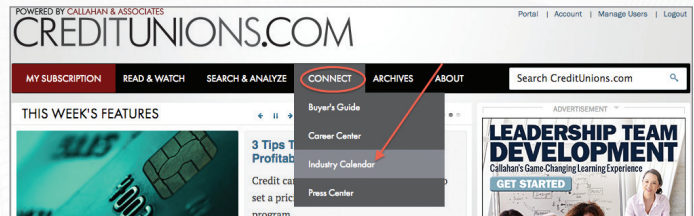


## LIVE WEBINARS

(Leadership Only)

To view and register (2 options):

1. Log into your Client Portal to view our Upcoming Webinars RSS feed.
2. Visit our Industry Calendar here: [www.creditunions.com/industry-calendar](http://www.creditunions.com/industry-calendar)
  - a. By default, the Industry Calendar shows events from both Callahan & Associates and many other industry players. To focus these results, choose "Callahan & Associates" in the company dropdown and "Educational Webinars" in the filter dropdown.



**Note:** Occasionally, Callahan will also offer free Industry Webinars to all client levels as well as non-clients in order to foster important awareness and discussion. These events can be selected and registered for using the same process as Leadership client-only webinars.

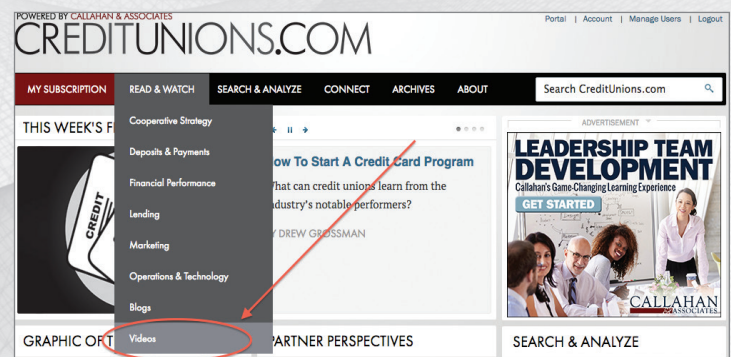
## ON-DEMAND WEBINARS

To view (2 options):

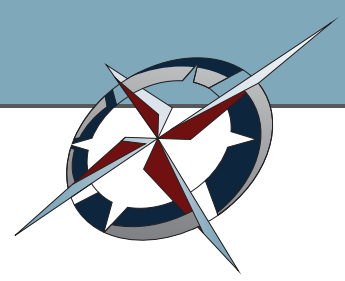
**From your Client Portal:** Log in and look for the "Webinar Archives" RSS feed for a list of our recent events.

**From CreditUnions.com:** Hover over the "Read & Watch" header and click on the last option – Videos. You can search this full list of video archives by when the event was hosted, the type of event, or using keywords.

**Note:** Client-only Leadership webinar recordings will be marked with a blue "L" lock icon while open-to-all Industry Webinar recording will be marked with a Red "E" lock icon.





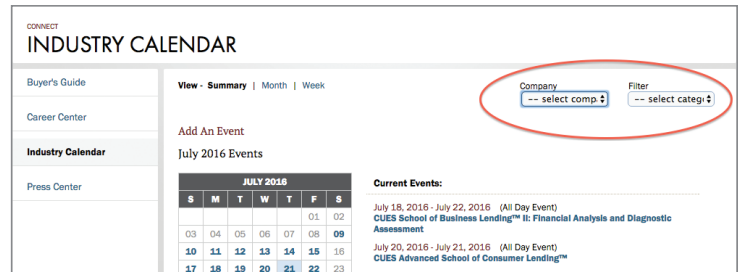


## ROUNDTABLES

(Leadership Only)

### To view and register (3 options):

1. View the Upcoming Roundtables RSS feed module on your Client Portal.
2. Visit our Industry Calendar here: [www.creditunions.com/industry-calendar](http://www.creditunions.com/industry-calendar)
  - a. By default, the Industry Calendar shows events from both Callahan & Associates and many other industry players. To focus these results, select "Callahan Leadership Roundtables" in the filter dropdown.
3. Visit [www.callahan.com/roundtables](http://www.callahan.com/roundtables) for a full list of these upcoming events.



## THE EXECUTIVE RESOURCE CENTER

(Leadership Only)

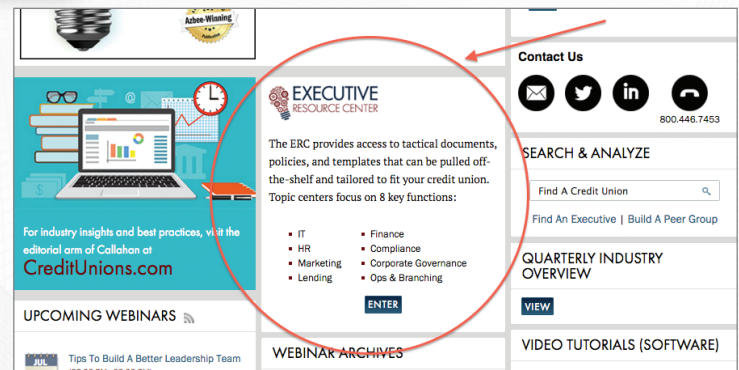
### Log in to your Client Portal to access.

#### To upload documents:

From the ERC homepage, click the "Submit A Document" button to be taken to a form where you can upload your document, select its categories and subcategories, select the level of identifying information (organization name and logo, etc.) you're comfortable with preserving, and provide any other special handling instructions. Click "Submit" to upload to our system for review, scrubbing, and eventual posting.

#### To download documents:

From the ERC homepage, click one of the 8 master categories to be taken to a list of those documents. From there, use the Browse Resources tool to easily move between categories, narrow in on a subcategory, find a specific document file type (Excel, PowerPoint, Word, etc.), or do a general search based on keyword. Once you find your desired document, you can either choose to preview it on the web or download it to your computer.



## ADDITIONAL OFFERINGS

### Consulting & Speaking

This offering is purchased separately from your Callahan client subscription. Visit [www.callahan.com/our-approach](http://www.callahan.com/our-approach) to request more information about consulting and [www.callahan.com/speakers-bureau](http://www.callahan.com/speakers-bureau) to request more information about booking a Callahan speaker.

### Leadership Team Development

This offering is purchased separately from your Callahan client subscription. Visit [www.callahan.com/ltd](http://www.callahan.com/ltd) to request more information about Leadership Team Development

### Callahan Financial Services/TRUST for Credit Unions

This offering may be participated in independent of a Callahan client subscription. Visit [www.trustco.com](http://www.trustco.com) for more information about the TRUST Mutual Funds or to sign up for the daily Dwight Johnston Economic Update newsletter.