

Data Driven Design

The DBSI logo consists of the letters 'DBSI' in a bold, dark blue, sans-serif font. The letters are contained within a white rounded rectangular shape with a thin dark blue border. The background of the entire slide is a deep purple with a pattern of overlapping circles in shades of purple, white, and lime green, and a faint grid of lines.

**VISIONARY
VOICES** 2026



Proprietary Purchase Intent Database



**Millions of
Financial
Conversations**



Segments



**Financial Market
Basket and
Purchase Behavior**

INFORM

DECISION MAKING



**Neighborhood
Served**



**Households and
Businesses**



**Demographics
and Statistics**



**Product Line
Demand**

INFORM

DECISION MAKING



**Product
Line
Demand**



**Penetration
and
Performance**



**Incremental
Growth**



**Staffing and
Technology**



**Model
Earnings
Impact**

**VISIONARY
VOICES** 2026



THREE

HIGH IMPACT TOPICS



Level Setting Performance and Staying Ahead of the Growth Curve



Defining the Branch of the Future



Evaluating the Existing Branch Network

**VISIONARY
VOICES** 2026


THE
LONG
GROUP

Level Setting Performance and Staying Ahead of the Growth Curve



Josephine Moran

President and CEO



Plan well. Live well.

Defining the Branch of the Future



Aimée Sundstrom
Director, Member Expansion,
Elevations Credit Union



Objectively evaluate the branch network

- **Consolidate**
- **Reposition**
- **Reinvest**



Tom Long
The Long Group