

# IN TOUCH

Provided to Sponsor Companies of Allegacy Federal Credit Union

## ANOTHER SUCCESSFUL SPONSOR COMPANY LUNCHEON

This past May, Allegacy held its 8<sup>th</sup> Annual Sponsor Company Luncheon, which drew a crowd of more than 100 people. Each year, this luncheon is held as an appreciation event to thank all of our sponsor company representatives for their continued support of Allegacy. Everyone present received a hot catered meal, a cool dessert from Blue Ridge Ice Cream, and a special gift at the end. Tours of our building were available, as well as a chance to meet many of our senior management team members. Our speakers included Julie Reimers from JBA Benefits, a newly acquired company and Katherine Peterson from Payroll Solutions, our newest business venture. Be sure to mark your calendars and plan to attend again next year!

## PARKWAY PLAZA FINANCIAL CENTER OPENING



*New Location  
Now Open!*

We're celebrating the opening of our 14<sup>th</sup> Triad financial center located at 1375 Silas Creek Parkway. This location will have extended hours ranging from 8:30 a.m. – 5:00 p.m. Monday through Thursday, and 8:30 a.m. – 6:00 p.m. on Friday. The drive-thru will be open from 7:30 a.m. – 7:00 p.m. Monday through Friday, and 9:00 a.m. – 1:00 p.m. on Saturdays. Joey Johnson and her staff invite you to visit our newest location today to let us serve you!

2<sup>nd</sup> Quarter 2007

## BELINDA WILSON PROMOTED TO DIRECTOR



Congratulations to Belinda Wilson on her promotion to Director of Business Development and Allegacy Wealth Management. Belinda recently

celebrated her fifteen-year anniversary with the credit union. "My experience here has been very rewarding. I have had the opportunity to grow on many levels." In her new role, she will continue to oversee the business development staff as well as our relationship managers. One of her top priorities is to create a strategic plan positioning our wealth management division for optimal future growth. "Combining the strength and knowledge of our current relationship managers along with superior member service, is a recipe for success." The leading principles of Allegacy Wealth Management are to assist our qualified members in personal financial management in order to maximize their opportunities.



## ALLEGACY OFFERS REBATE WITH REALTY SERVICES

Spring is in full swing, which is one of the best seasons for home buyers and home sellers. Contact one of our agents today to learn how you may qualify for a **rebate** when you buy or sell your home through Allegacy Realty. Visit us online at [www.AllegacyRealty.com](http://www.AllegacyRealty.com) to view our listings or give us a call at 336.774.3700/800.782.4670. Remember, Allegacy also has great mortgage rates too!

## INTERESTED IN GROWING YOUR WEALTH?

Allegacy Investment Group can provide *free* on-site seminars and lunch & learns for your staff to teach them the fundamental principles of growing their wealth. Many people don't realize how making simple changes to their daily lives can result in huge changes in their wallets. By scheduling a 30-minute seminar, we'll teach your staff the seven basic principles of growing wealth, which will empower them with knowledge to live happy, fruitful lives. Other topics including retirement planning, basic investing and college savings are also available. Contact Jennifer Betson today at 336.774.2771 / [jbetson@allegacyfcu.org](mailto:jbetson@allegacyfcu.org) to schedule a visit!

## UNIQUE LOW DOC MORTGAGE PROGRAM

*We created a unique mortgage program that is  
simple and fast:*

- High loan-to-value with no PMI
- No appraisal required on \$250,000 or less
- No escrow required
- We pay closing costs, except a 1% origination fee
- Quick turn-around with minimal documentation
- Fixed interest rate

Visit [www.allegacyfcu.org](http://www.allegacyfcu.org), call 336.774.3400/800.782.4670, or stop by a convenient financial center today to learn more!

## MEET OUR PAYROLL SUPPORT STAFF



**Kelly Cozart**  
Support Specialist, ACH/Direct Deposit  
336.774.2780 / [kcozart@allegacyfcu.org](mailto:kcozart@allegacyfcu.org)



**Miranda McClannon**  
Support Specialist, ACH/Payroll Deductions  
336.774.2784 / [mmclannon@allegacyfcu.org](mailto:mmclannon@allegacyfcu.org)

If you have any payroll questions regarding a new or existing Allegacy account for one of your employees, we invite you to call one of our dedicated payroll specialists. They can assist with direct deposit and payroll deduction changes or set up, routing numbers, ACH support and more.

## DON'T FORGET ABOUT OUR INCENTIVES

1.) Schedule with Allegacy to visit on site and hold *enrollments* for your staff and receive a gift card for one of the following values –

Break room setting: **\$15 card**  
Mandatory meeting or presentation: **\$25 card**  
Benefits fair (w/ prime location): **\$25 card**

2.) Schedule an *informative session* and receive a gift card for one of the following values –

Lunch & Learn: **\$15 card**  
Seminar: **\$15 card**  
Ice cream social: **\$15 card**  
Assist with increasing participation: **\$25 card**

Contact us today to start earning your rewards!

Jennifer Betson  
Specialist, Triad Region  
[jbetson@allegacyfcu.org](mailto:jbetson@allegacyfcu.org)

Rita Chheda  
Specialist, Charlotte Region  
[rhheda@allegacyfcu.org](mailto:rhheda@allegacyfcu.org)

\* Rules subject to change.

## Financial Center Locations

### North Carolina

#### Charlotte (1)

1900 Randolph Road, Suite 104 (near Presbyterian Hospital)

#### Greensboro (1)

7600 Thorndike Road (intersection of I-40 & Hwy 68)

#### Huntersville (2)

14229 Reese Boulevard, Suite B

10030 Gilead Road, Suite B110

#### Kernersville (2)

1030-B South Main Street (in the Southside Square Shopping Center)

212 East Mountain Street (near Town Hall)

#### Morganton (1)

107 Old Jamestown Road (Located in the old Carbon City Federal Credit Union office)

#### Winston-Salem/Clemmons (11)

Allegacy Village in Clemmons — 6320 Allegacy Way (off Lewisville Clemmons/Amp Road)

Fifth Street — 410 East Fifth Street, 1st Floor

Forsyth Medical Center — 3333 Silas Creek Parkway

Hanes Mall — 700 Highland Oaks Drive (at Hanes Mall Boulevard)

North Patterson — 4680 North Patterson Avenue (at University Parkway & Highway 52)

Parkway Plaza — 1375 Silas Creek Parkway (at Peters Creek Parkway intersection)

Reynolds Plaza Building — 401 North Main Street, 1st Floor

Tobaccoville — Moore RJR Drive (at Highway 52)

Westbrook Plaza — 1691 Westbrook Plaza Drive (off South Stratford Road)

Whitaker Park — 3701 North Cherry Street

Whitaker Square — 1985 North Peace Haven Road (at Robinhood Road)

### New Jersey and New York (2)

#### East Hanover

Tech Center Building, 200 DeForest Avenue

#### New York City

Empire State Building, 350 Fifth Avenue, Suite 3304

### Telephone Numbers

Member Services . . . 800.782.4670/336.774.3400

East Hanover, NJ Financial Center . . . 973.503.3154

New York, NY Financial Center . . . 212.971.9795

## 2007 Credit Union Holidays

### North Carolina Financial Centers

1/1 . . . New Years Day

1/15 . . . M.L.K. Jr. Day

2/19 . . . Presidents Day

5/28 . . . Memorial Day

7/4 . . . Independence Day

9/3 . . . Labor Day

10/8 . . . Columbus Day

11/12 . . . Veterans Day

11/22 . . . Thanksgiving Day

11/23 . . . D/A Thanksgiving

12/25 . . . Christmas Day

### New Jersey / New York Financial Centers

1/1 . . . New Years Day

5/25 . . . Memorial Day

5/28 . . . Memorial Day

7/4 . . . Independence Day

8/31 . . . Labor Day

9/3 . . . Labor Day

10/8 . . . Columbus Day

11/22 . . . Thanksgiving Day

11/23 . . . D/A Thanksgiving

12/24 . . . Christmas Eve

12/25 . . . Christmas Day

## WELCOME TO THE FAMILY!

*The following companies have recently joined  
Allegacy Federal Credit Union*

- Carolina Raptor Center  
[www.carolinaraptorcenter.org](http://www.carolinaraptorcenter.org)
- Piedmont Baptist College  
[www.pbc.edu](http://www.pbc.edu)
- Sharp Interiors  
[www.sharpinteriors.com](http://www.sharpinteriors.com)
- Superior Manufacturing  
[www.superiormanufacturing.com](http://www.superiormanufacturing.com)
- Polo Ralph Lauren  
[www.polo.com](http://www.polo.com)
- Jimmy John's Gourmet Deli  
[www.jimmyjohns.com](http://www.jimmyjohns.com)
- Children's Museum  
[www.childrensmuseumofws.org](http://www.childrensmuseumofws.org)
- Green Resource, LLC  
[www.green-resource.com](http://www.green-resource.com)
- North Mecklenburg Soccer Association

