

## Trellance Expands Data Capabilities with Acquisition of CU Rise Analytics

*Data leaders Trellance and CU Rise to merge analytics and predictive modeling capabilities to broaden portfolio of software, managed services, and consulting solutions for credit unions*

**Tampa, FL (February 24, 2021)** — Trellance, the leading provider of data analytics and business intelligence solutions for credit unions, today announced it has entered into a definitive agreement to acquire the assets of CU Rise Analytics, an international credit union service organization (CUSO) that specializes in using data science and predictive analytics to help clients reach growth objectives. CU Rise has operations in the United States and India.

The current capabilities of Trellance's patented M360 data platform, together with CU Rise's predictive analytics, broaden the combined company's software and solutions offerings. With the merging of portfolios, the company will also see growth in its managed services and consulting lines of business. Trellance and CU Rise have been longstanding commercial and technology partners.

"Trellance and CU Rise have delivered the industry's most insightful data solutions," shared Tom Davis, president and CEO of Trellance. "Through our strategic partnership, we've had an integrated product offering and a coordinated go-to-market approach. Now, we are on a path to release new analytics-based insights, benchmarks and predictive capabilities that help clients stay ahead of disruptive shifts in the market."

Bringing the two companies together highlights the high-growth rate that Trellance and CU Rise have both achieved in the last three years. Fueled by product investments and completion of strategic initiatives, Trellance has added dozens of new clients and now has more than \$90 billion of assets represented in its analytics platform client base.

"The CU Rise team is excited to join Trellance and deliver the most compelling set of data solutions available," said Karan Bhalla, CEO of CU Rise Analytics. "Serving credit unions and strengthening the industry through software and data science is our shared focus. Our combined roadmap is very compelling, and this is a big win for the industry."

During the last eighteen months and throughout the pandemic, Trellance has added a significant number of new employees from technology and consulting firms who have additional expertise in machine learning, artificial intelligence and demographic analysis. CU Rise further adds to those data and financial services skill sets and strengthens the company's focus on innovation and client support.

Financial details of the transaction, which is expected to close in early March, were not shared publicly.

[Learn more about the data solutions of Trellance and CU Rise.](#)

### **About Trellance**

Trellance is the leading provider of data analytics and business intelligence solutions, professional services and consulting for credit unions. The company's solutions and services, together with the patented common data model of its signature M360 product, are used by credit unions to find actionable insights, improve member experience and achieve portfolio growth. Founded in 1989,

Trellance is headquartered in Tampa, Fla. and serves more than 1,500 organizations throughout the United States.

**About CU Rise**

CU Rise Analytics is an international CUSO helping credit unions leverage the power of data to better understand their members. CU Rise identifies the ideal intersections of member need and business opportunity, providing cost-effective, actionable solutions that help clients achieve real results. The company is a proven provider of data science, strategic best practices and advisory services.

**For Media Inquiries:**

Trellance  
Rick Bradberry, CRO  
(888) 930-2728  
rbradberry@trellance.com

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