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ACCESS SOFTEK, INC



Mountain America Credit Union Selects Access Softek Robo-Advisor, EasyVest™ - Robo-Advisor Now Available to Over 2 Million Combined End-Users -

Berkeley, Calif., April 13, 2021 – [Access Softek, Inc.](#), an omnichannel digital banking provider, announced that Mountain America Credit Union (MACU), \$12 billion in assets, has selected EasyVest, Access Softek's integrated robo-advisor solution, to provide automated investing solutions to members.

EasyVest provides an automated investing service that is seamlessly integrated into online and mobile banking. The software, which is part of Access Softek's enterprise suite, provides a valuable, wealth-building service to the credit union's members and increases member engagement. The solution also expands the services offered by MACU, allowing the credit union to compete with the largest banks, while also providing a new no-risk, non-interest related, diversified source of revenue.

The software manages the large number of investment accounts that begin with assets below the threshold for human investment managers to handle. As the portfolios grow, MACU can then transition the larger accounts to their advisors for additional services.

"Investing has long been thought of as an activity only for the wealthy. EasyVest changes all that," said Kelly Albiston, Senior Vice President and Chief Technology Officer at Mountain America Credit Union. "This partnership with Access Softek allows virtually all of our members to enhance their financial dreams by periodically saving and investing small amounts."

With a series of questions, EasyVest assesses the consumers' timeframe, risk appetite, income and investment goals in order to choose the right portfolio for them. Consumers can invest in individual or retirement accounts, track performance and transfer funds in and out of the investment account directly through online or mobile banking. EasyVest features an array of low-cost, diversified exchange-traded funds (ETF) portfolios and environmental social and corporate governance (ESG) options.

"EasyVest allows credit unions and community banks to expand everyday access to investment and investing services – bringing Wall Street to Main Street – without the need to open an account at a competing financial institution," said Chris Doner, founder and CEO of Access Softek. "We believe robo-advisors will be a must-have service for every credit union within three years, and we are proud to help Mountain America Credit Union be on the leading edge of innovation."

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About Mountain America Credit Union

Mountain America Credit Union first opened its doors in the 1930s with a commitment to guiding our members to define and achieve their financial dreams. Today, our essence—guidance—remains the focal point of our identity. It's a purpose-driven identity to ensure that everything we do moves you safely along your journey. For more information, please visit [macu.com](#).

About Access Softek, Inc.

Access Softek sets the standard for the omnichannel digital banking landscape, having developed the first downloadable apps for mobile banking. Since that time, Access Softek has extended its track record of innovation to online banking, biometric authentication, real-time fraud prevention, and automated investing integrated directly into a financial institution's digital banking platform, among many other innovative products. Now in its 35th year, Access Softek has delivered industry firsts to over 400 bank and credit union clients from its Berkeley, California headquarters. Learn more at AccessSoftek.com.

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