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**Xpress Data Seamlessly Merges Critical Documents for Large CU Merger**

*Top 100 Credit Union now relies on XDI for all of their member communication*

# SAN DIEGO, CA, June 29, 2021 –

Xpress Data, Inc. (XDI), the only company in the nation specializing exclusively in the production and delivery of credit union notices, statements, and other event-driven member correspondence, recently handled the member communications component of the successful merger of TruStone Financial Credit Union and Firefly Credit Union. XDI was called upon to integrate numerous types of important member documents from Firefly Credit Union’s system into the newly combined TruStone Financial Credit Union. The new credit union has over $3.8 billion in assets, serves nearly 200,000 members, and is now the second-largest financial cooperative in Minnesota.

While TruStone became the current name for the newly merged credit union, TruStone chose to keep Firefly’s preferred existing document management vendor: XDI. Mike Hoog, VP at XDI, notes that “with both Firefly and TruStone being existing XDI clients, our team was ready to assist them in any way, as always. Credit union member communications is all that we do, and our team came together to make this complicated merger seamless for both credit unions.” The magnitude of the integration is evidenced by this number alone: over 2.5 million statements, tax documents and other sensitive financial documents from Firefly had to be rebranded to TruStone. Plus, there was a core data processing system conversion that took place as part of the project and all existing documents had to be mapped to the new system’s data format.

During the merger, all of Firefly’s existing document processes, along with all of the new TruStone volumes and document types, had to be meticulously and accurately combined. Anne McClure, SVP of Client Services & Marketing at XDI, explains that “we held weekly meetings to ensure that the document merger was seamless to TruStone’s members. We even developed custom code to ensure that all aspects of the conversion went flawlessly.” Even the fact that there were thousands of duplicate member account numbers between the two large credit unions did not deter the XDI team on their document conversion mission!

Gary Jeter, TruStone’s Chief Technology Officer, said, “XDI has been a great partner, and worked closely with us throughout this very complex merger of two great credit unions. Their support and expertise have been invaluable.”

TruStone’s members now enjoy many positive results of the merger such as increased branch locations, improved products and services, and greater investments in technology. McClure, who has over thirty years of experience working in the credit union movement, confirms that “there are a lot of benefits to their members in terms of economies of scale with this merger. It was certainly one of the largest that I have ever seen over the course of my career, and we were pleased to be part of making it a tremendous success.” She is not alone in declaring the merger successful; case in point: it was hailed by GonzoBanker.com as 2020’s “Credit Union Merger of the Year.”

**About Xpress Data, Inc.**

Headquartered in San Diego and founded in 1995, Xpress Data, Inc. started as an all-purpose digital printing and mailing operation. In 1999, the company made a major strategic decision to focus entirely on the credit union industry. Today, XDI serves 200 progressive credit unions, collectively serving more than 20 million members and representing $345 billion in assets from redundant production facilities in San Diego, CA and Charlotte, NC. Additional information is available at [www.xdi.com](http://www.xdi.com).