



WealthWise delivers free finanicial guidance and support—only to Cross Valley members and their family.

Free, unlimited access to our in-house team of Certified Credit Union Financial Counselors

Grow your savings

Better understand rates

Create goals and budgets

Build your credit

Discover which loans work best for your needs

And so much more

Ready to get started?

Flip over to the back and follow the three simple steps. \rightarrow

WealthWise is **free** for members and their families.

Did you know—

86%

of Americans have at least one financial goal they'd like to achieve this year?*

*Survey conducted by Bankrate.com



In just three steps, you'll be on your way to new financial opportunities.



Step 1: Tell us more about you

Your full name ————————————————————————————————————	
Preferred Contact Method (email/phone) —	
Best Days and Times to Contact You:	
Preferred Meeting Type: Virtual	Phone In-Person
referred Meeting Type.	Friorie III-reison
CL . O. T. II	
Step 2: Tell us yo	ur goals
Kicking off your journey to financial v	
setting some clear, achievable goals. Use to tell us more about what you hop	
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Step 3: We'll be in touch!

One of our financial counselors will reach out using your preferred method of contact to schedule your first meeting. In the meantime, if you have questions feel free to reach us at wealthwise@crossvalleyfcu.org