



Appendix 1: Implementation Checklist

- ☐ Legal review of Participation Agreement and Exhibits A and B
 - ☐ Participation Agreement signed and returned to NYCUA Exhibit B (Official Rules) customized and final PDF returned to NYCUA
 - ☐ Exhibit A (Implementation Guide) reviewed
- ☐ Appendices 1-9 reviewed (available on the administrative website)
 - ☐ Appendix 1 – Implementation Checklist
 - ☐ Appendix 2 – Credit Union Information Sheet
 - ☐ Appendix 3 – Data Requirements and Sample File
 - ☐ Appendix 4 – Truth in Savings Disclosure Template
 - ☐ Appendix 5 – Marketing Plan
 - ☐ Appendix 6 – Process for Contacting Winners
 - ☐ Appendix 7 – Winner Eligibility Checklist
 - ☐ Appendix 8 – Winner Media Release
- ☐ Create product team
 - ☐ Credit union administrative website access – Fill out Appendix 2: Credit Union Information Sheet and return to TruLync Product Manager
 - ☐ E-mail credit union logo to NYCUA Product Manager
- ☐ TIS Disclosure prepared for your members
- ☐ Marketing efforts planned
 - ☐ Review Appendix 5: Marketing Plan
 - ☐ Plan 12-month marketing strategy
 - ☐ Order marketing materials
 - ☐ Add Lucky Savers banner ad and logo on credit union website
- ☐ Data file preparation
 - ☐ Review Appendix 3: Data Requirements and Sample File
 - ☐ Set up 12 month share certificate in data processor
 - ☐ Prepare test file and upload between the 15th and last day of any month (no testing between 1st and 14th of month to avoid confusion between live and test data)
 - ☐ Monthly data files are due by 3rd business day of each month
- ☐ Training session set up and completed with all employees
 - ☐ Trainer's Guide
 - ☐ Product reference, prize distribution and FAQ sheets posted to staff intranet
 - ☐ Product Training PowerPoint (customize for your credit union)
- ☐ Media/Public Relations efforts planned
 - ☐ Customizable Winner Press Release sent to local media
 - ☐ Talking Points reviewed and accessible in case of media inquiries