

# DOLLAR\$&\$ENSE

SEPTEMBER 2024

A NEWSLETTER OF NELSON & DISTRICT CREDIT UNION



## Coming in September: Member Voice Survey We want to hear from you!

At NDCU, we strive to continuously improve so we can provide you and our members with the best possible experience. Our Member Voice survey will be launching this September! Please keep an eye out for an email from NDCU & Sentis Research asking for your feedback.

The survey will be sent on September 3rd to business banking members and sent on September 16th to personal banking members.

Alternatively, if you do not receive an email invite from us, you can access the survey from our homepage at [www.nelsoncu.com](http://www.nelsoncu.com) after September 18th.

The survey will only take 10 minutes of your time, and you can be entered to win:

- 1 grand prize of \$1,000 cash
- One of 3 prizes of \$200 cash
- One of 3 NDCU Community Hero Awards: \$200 donated to a local nonprofit of your choice.

Thank you for taking the time to share your ideas and feedback.



*Follow us on Facebook  
for news and stories  
about your credit union  
and community.*

## PREVENT FRAUD



When you are asked for personal or sensitive information like your SIN, account or password information in an unsolicited email, text or phone call, always be cautious and skeptical. Scammers and fraudsters try to manipulate people to give up confidential information by creating a sense of urgency or fear. When in doubt, delete or hang up and contact the organization directly.



## Grow your money your way: Financial Planning with NDCU MoneyWorks



Meet Jon Beaulac, a member of the NDCU MoneyWorks team who is a Wealth Advisor with Aviso Wealth. Jon can review your personal financial situation, goals and objectives and help you to build a plan to reach them. With over 7 years of experience, Jon will help you to make sound decisions for every stage of your life.

Together, we can help you:

- Invest to support your lifestyle today and in the future

- Build a retirement plan tailored to you
- Achieve peace of mind for you and your loved ones
- Establish an estate plan that reflects your values

### Contact us today:

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[www.nelsoncu.com/wealth](http://www.nelsoncu.com/wealth)

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## Bank your way: Small business banking at NDCU

**We take  
the time  
to get to know you  
and your business.**



You are more than an account number when you bank with NDCU. We take the time to get to know you and your business, and we have a team dedicated to business banking.

At NDCU, decisions on business and personal loans and other credit products are made locally, by people who live and work in our community and who understand the cycles of our local economy. It's the credit union difference. We're ready to help your business thrive. Learn more at [www.nelsoncu.com/yourbusiness](http://www.nelsoncu.com/yourbusiness).

**SMALL BUSINESS**



**Nelson & District**

CREDIT UNION *Logically. Locally.*