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THE ALLEGACY IMPACT ECOSYSTEM

Leveraging Strategic Pipelines for Regional Dominance



Presented by

Tavoires Vanhook

Regional Business and Community Development Specialist - Palladium

MY VALUE PROPOSITION:

"I don't just bring ideas. I bring proven relationships, tested strategies, and a pipeline already in motion. I will make Allegacy essential to this region."

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The Regional Opportunity

The Growth Corridor: Palladium to University District

Why This Region, Why Now?

1

Palladium District Growth

High-density professional and residential development creating thousands of new households

2

University Enrollment

35,000+ students at NC A&T and UNCG approaching their "first financial decision" moments

3

GHA Transformation

Greensboro Housing Authority residents actively building toward homeownership through FSS

4

Transition Demographics

Thousands moving from renting to owning, from student to professional, from saving to investing

THE BOTTOM LINE: This is not just growth - it's a generational opportunity to capture lifetime members at their moment of decision.

Priority 1: The "Wealth Engine"

Greensboro Housing Authority & Family Self-Sufficiency Program



My Existing Relationship:

At Revity, I helped engineer the High-Yield CD savings program for FSS participants. I have a seat at the table at Claremont Courts - not just a contact, but an active partnership. Meeting scheduled Jan 30th with Todd A. Fagan, GHA Resident Engagement & Homeownership Coordinator.

THE STRATEGY:

"Savings-to-Legacy" CD Program

High-yield savings for FSS escrow accounts

Enhanced Credit Building

Leverage secured card + coaching for FSS participants

500+

FSS Participants

\$5K-\$15K

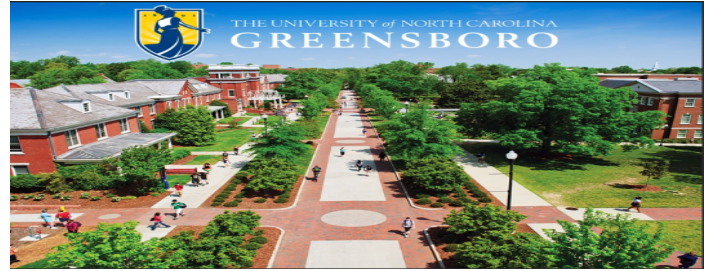
Avg Escrow Savings

85%

Want Homeownership

Priority 2: The "University Hub"

NC A&T State University + UNC Greensboro Strategic Pipeline



35,000+ Students = 35,000 Future Members

INNOVATIVE STRATEGIES:

NEW

"First Dollar" Digital Onboarding

QR codes at orientation for instant account setup with \$25 bonus

NEW

Peer Ambassador Program

Train student leaders to recruit peers with incentives

NEW

Financial Wellness Score

Gamified app feature students track like a fitness score

PROVEN

GHOE Pop-Up Banking

High-visibility presence at homecoming (50,000+ attendees)

PROVEN

Graduation Milestone Program

Auto loan & credit card offers timed to graduation



Priority 3: Employer Pipeline Program

Capturing Members Through Workplace Partnerships

THE INNOVATION:

Most credit unions wait for members to walk in. I propose we GO TO THEM. Partner with major employers for direct deposit incentives, on-site enrollment, and HR partnerships.

Target Employers:

HEALTHCARE SYSTEMS

Cone Health, Novant, Wake Health

TOP PRIORITY

WAKE FOREST UNIV

Better penetration goal

9,322 students

HABITAT FOR HUMANITY

Community partnership

Mission alignment

CHAMBER MEMBERS

Guilford Merchants Assoc.

Business network

THE APPROACH:

- > On-site enrollment during open enrollment periods
- > \$100 direct deposit bonus for new members (NEW incentive)
- > Payroll deduction savings programs
- > Extend Allegacy's existing workshops TO employer sites (leverage strength)

The Digital Advantage

Meeting Members Where They Are - On Their Phones

Students and young professionals are mobile-first. Allegacy's digital strategy must meet them there.

PROPOSED DIGITAL INNOVATIONS:

Financial Wellness Score Gamified score tracking savings habits. Students compete with friends. (Allegacy doesn't have this)	5x app engagement
"Round-Up" Micro-Savings Every purchase rounds up to savings automatically. (Allegacy doesn't offer this)	\$500+/yr savings
Instant QR Account Creation Scan QR at events, full account in 60 seconds. (Current QR is login only)	10x event signups
Peer Ambassador Incentives Student leaders recruit peers for rewards. (No referral program exists)	Viral growth

The 90-Day Launch Plan

From Day One to Regional Dominance

Days 1-30 **IMMERSION**

- > Audit current business relationships
- > Attend Chamber & Guilford Merchants Association meetings
- > Establish bi-weekly GHA presence at Claremont Courts
- > Map university student life offices at NC A&T, UNCG, Wake Forest

Days 31-60 **ACTIVATION**

- > Secure meetings with 5-10 prospective businesses
- > Begin strategic outreach to Cone Health, Novant, Wake Health
- > Launch "First Dollar" QR enrollment at universities
- > Initiate Habitat for Humanity partnership discussions

Days 61-90 **RESULTS**

- > Secure 1 high-impact healthcare partner
- > Wake Forest University member growth campaign
- > Measure pipeline results & present strategic plan
- > Prepare for GHOE major activation

Why Tavoires Vanhook?

I Don't Just Have Ideas - I Have Proof

Existing GHA Relationship

Engineered the High-Yield CD program at Revity for FSS participants. I already have a seat at Claremont Courts.

Community Integration

As founder of EchoDeed, I work with Eastern Guilford schools, understanding how to build trust in diverse communities.

University Connections

Active relationships with NC A&T community through local business development and youth mentorship.

Digital Innovation Mindset

Built EchoDeed from scratch - a mobile-first platform that engages students and drives behavioral change.

Results-Driven Approach

Every strategy I propose comes with measurable targets and accountability. No vague promises.

MY COMMITMENT:

"I will make Allegacy the default financial partner for every person in transition in the Palladium region. Not through advertising - through essential integration into the moments that matter most."



Let's Build This Together

The pipeline is ready. The relationships are built.
The only question is: How fast do we want to grow?

35,000+

University Students

500+

GHA FSS Participants

40,000+

Regional Employees

= Your Future Members

YOUR PRIORITIES - MY PLAN:

- > Audit current business relationships & attend Chamber/Merchants Association meetings
- > Secure 5-10 prospective business meetings to land 1 high-impact partner
- > Strategic approach to Cone Health, Novant, Wake Health, Wake Forest University
- > Connect the gaps with a comprehensive strategic plan

Tavores Vanhook

Regional Business and Community Development Specialist - Palladium

Ready to start on Day One.