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# THE ALLEGACY IMPACT ECOSYSTEM

Leveraging Strategic Pipelines for Regional Dominance



Presented by  
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**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."

# 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**

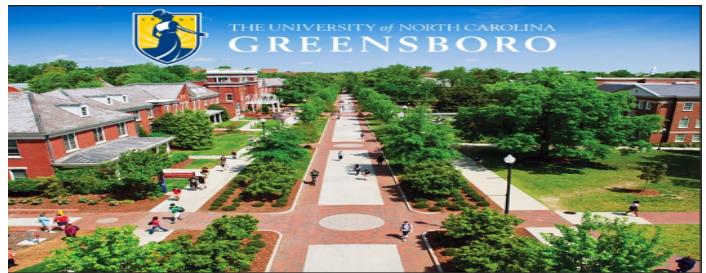
Avg Escrow Savings

**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

#### HABITAT FOR HUMANITY

Community partnership

#### Mission alignment

#### WAKE FOREST UNIV

Better penetration goal

**9,322 students**

#### 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 Tavores 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.**