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Source summary · Grow

The future of finance is grassroots

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A recorded ShiftMate webinar on the third-place concept, the relationship between growth and service, and investment in sustainable community finance.

Source summary by ShiftMate. This PDF contains the local summary; the original source is linked below.

What leaders should take away

- Community institutions can create value by strengthening the places and relationships that connect members.
- Growth and service should be treated as connected operating responsibilities.
- Sustainable growth requires intentional institutional investment.

Watch the webinar: https://lnkd.in/e4wjJMCR

About the webinar

The future of community finance will not be defined by technology alone. It will be shaped by the way institutions use technology to strengthen relationships, create useful places of connection, and invest in the communities they serve.

This recorded ShiftMate webinar explores three connected ideas: the “third place” concept, the relationship between service and growth, and the institutional investment required to make that growth sustainable.

Why it matters for governed AI

AI should help a credit union act on its purpose with greater consistency. That requires more than identifying an opportunity. The institution must connect what it knows about the member, what it has approved, and what it is trying to grow.

The leadership question is not whether AI can create more activity. It is whether the institution can use intelligence to deepen the relationships that make community finance distinct.

Continue the work

Use the proof-of-value guide to define how a relationship or community-growth idea can move from ambition to a controlled, measurable initiative.

Turn a relationship idea into a practical evaluation: Read the proof-of-value guide.