

FOR IMMEDIATE RELEASE

Excite Credit Union Opens Headquarters and New Branch in South San Jose

*CA State Treasurer Fiona Ma, CPA scheduled to speak on
Savings Programs for Individuals at ribbon cutting ceremony*



SAN JOSE, Calif. (April 16, 2024) – Excite Credit Union proudly announced the official ribbon-cutting for its newest branch on Bernal Road, San Jose, will take place April 26. The event will be attended by city officials, local businesses, nonprofits, and other partners. Notably, California State Treasurer Fiona Ma, CPA, will speak about CalKIDS and other unique state-wide savings programs. President and CEO of the California and Nevada Credit Union Leagues, Diana Dykstra, will share remarks on the credit union difference and the impact Excite CU imparts on the local community.

The new Bernal Branch is currently open and serving credit union members. It is the fourth Excite CU branch in San Jose, located in the same building as their California headquarters. The Bernal Branch team collectively boasts over 25 years of experience and seven different languages spoken. Members are greeted with a welcome kiosk and state-of-the-art monitors showcasing the latest offerings. Products include personal checking and savings accounts with no monthly maintenance fees, small business loans, credit-building tools, retirement planning, and more.

Unique across the Bay Area, Excite is a Community Development Financial Institution (CDFI), Low Income Credit Union (LICU), and Juntos Avanzamos-designated. “The opening of the Bernal Branch is one facet of our ongoing commitment to the community,” said Brian Dorcy, CEO of Excite CU. “We are uniquely positioned to serve the underserved and those who are unbanked or credit invisible, while continuing to support legacy members who are part of our 70-year history in San Jose.”

Excite Credit Union and Excite Foundation have partnered with the State Treasurer’s Office to promote the California Kids Investment and Development Savings program (CalKIDS), which provides eligible low to moderate-income public-school students with up to \$1,500 in a college savings account. CalKIDS is administered by the ScholarShare Investment Board (SIB), a state agency chaired by State Treasurer Fiona Ma.

“We collaborate with organizations like Excite to reach and inform families of these programs,” said Treasurer Ma. “Savings Programs for Individuals allow Californians to proactively plan and save for their futures. More than 300,000 CalKIDS accounts have been claimed thus far, and that number is growing.”

Dykstra added, “For a financial institution to be so imbedded in their community that they’ve build trust, rapport and capacity for families, schools and other agencies is a great testament to Excite’s mission and values.”

About Excite Credit Union

Excite Credit Union is a member-owned and community-oriented not-for-profit financial cooperative. Their mission is to give everyone the chance to build a stronger financial future. With branches in California and North Carolina, Excite offers a full range of banking for individuals, businesses and organizations. Excite is also the only credit union based in Santa Clara County designated as a Community Development Financial Institution (CDFI), Low Income Credit Union (LICU), and Juntos Avanzamos member of the Inclusiv network. These designations reflect the credit union’s ongoing commitment to serving low-to-moderate income households, entrepreneurs and immigrant communities with fair and safe deposit and loan products. For more information, please visit www.excitecu.org/community.

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