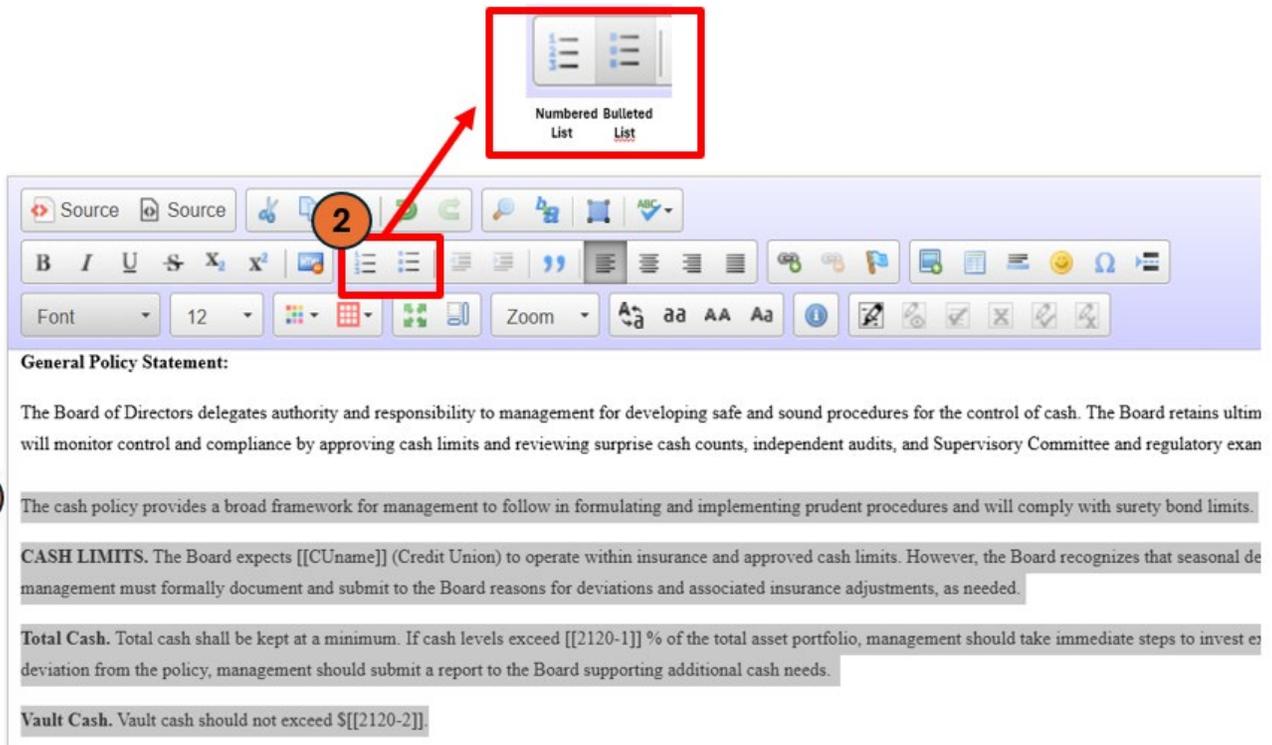


INSIGHT360

Manage and Format Bulleted and Numbered Lists

Add Numbered or Bulleted List Formatting:

1. Highlight the text for the list.
2. Click either the numbered or bulleted list icon in the Toolbar. Separate list items will be created for each new paragraph.



General Policy Statement:

The Board of Directors delegates authority and responsibility to management for developing safe and sound procedures for the control of cash. The Board retains ultimate responsibility for monitoring control and compliance by approving cash limits and reviewing surprise cash counts, independent audits, and Supervisory Committee and regulatory examinations.

1 The cash policy provides a broad framework for management to follow in formulating and implementing prudent procedures and will comply with surety bond limits.

CASH LIMITS. The Board expects [[CUname]] (Credit Union) to operate within insurance and approved cash limits. However, the Board recognizes that seasonal demand for cash management must formally document and submit to the Board reasons for deviations and associated insurance adjustments, as needed.

Total Cash. Total cash shall be kept at a minimum. If cash levels exceed [[2120-1]] % of the total asset portfolio, management should take immediate steps to invest in assets to meet the deviation from the policy, management should submit a report to the Board supporting additional cash needs.

Vault Cash. Vault cash should not exceed \$[[2120-2]].

To remove numbered or bulleted list formatting:

1. Highlight the list items to be returned to paragraph format.
2. Click the numbered list or bulleted list icon in the Toolbar. The text will return to paragraph format. Some extra spacing may need to be removed between lines.

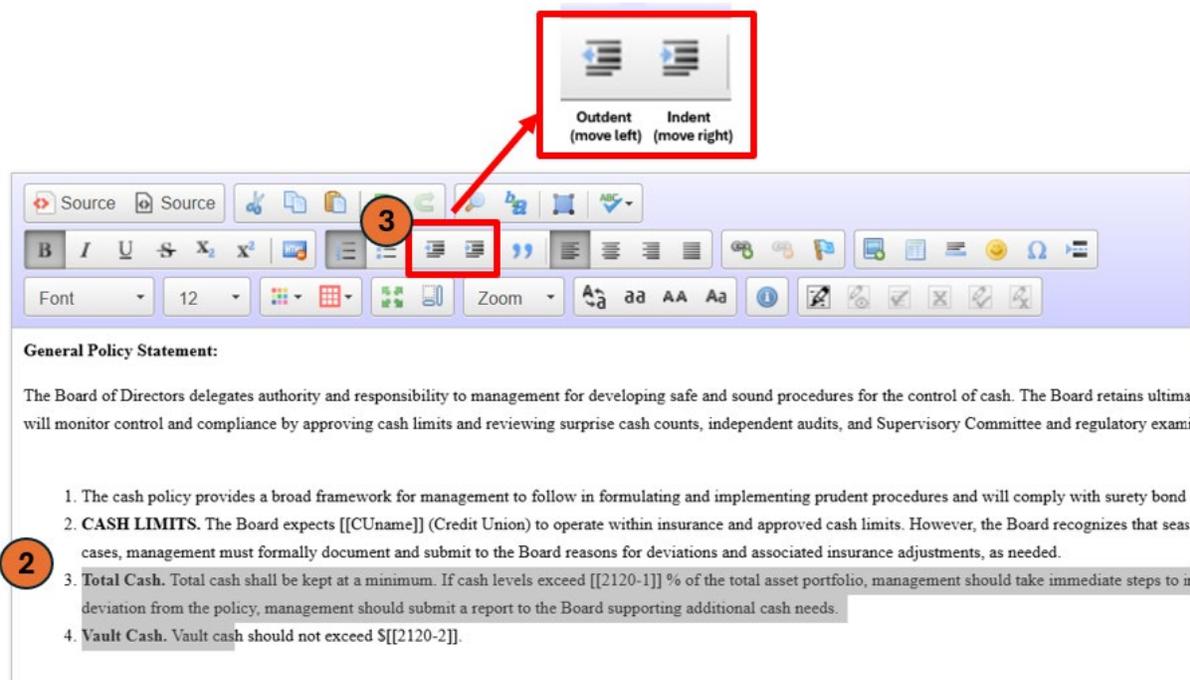
Add New Items to an Existing Numbered or Bulleted List:

1. Place your cursor at the end of the previous item within the existing numbered list, then press the ENTER key, which will create a new item in the numbered list.

Note: At this point the new item may not yet be in the correct position or may not yet have the correct numbering style or spacing. This is OK.

2. Add the text for the new item.
3. To move an item to the correct position:
 - a. Highlight the text
 - b. Click the "Increase Indent" icon to move the item to the right or the "Decrease Indent" icon to move the item to left.

Note: "Decrease Indent" can be used more than once if you are several levels deep in the sub-list and the item needs to move more than one position to the left.



The screenshot shows a rich text editor interface. The toolbar at the top contains various icons for text formatting and editing. A red box highlights two icons: "Outdent (move left)" and "Indent (move right)". A red arrow points from this box to the "Decrease Indent" icon in the main toolbar, which is also circled in red with the number "3". Below the toolbar, the text "General Policy Statement:" is followed by a paragraph of text. Below that, a numbered list is displayed. The first item of the list is circled in red with the number "2".

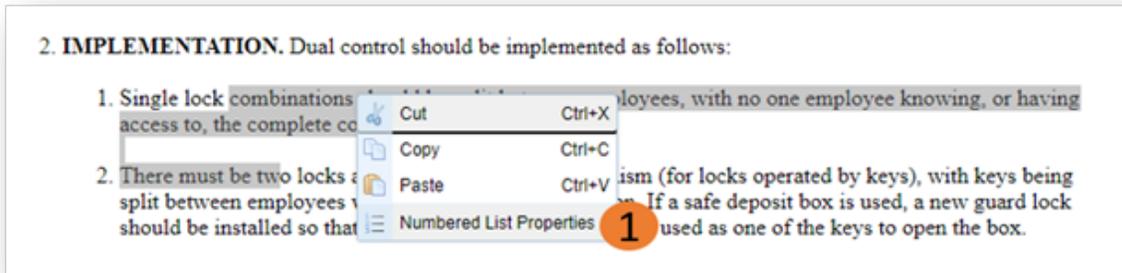
General Policy Statement:

The Board of Directors delegates authority and responsibility to management for developing safe and sound procedures for the control of cash. The Board retains ultimate responsibility for monitoring control and compliance by approving cash limits and reviewing surprise cash counts, independent audits, and Supervisory Committee and regulatory examinations.

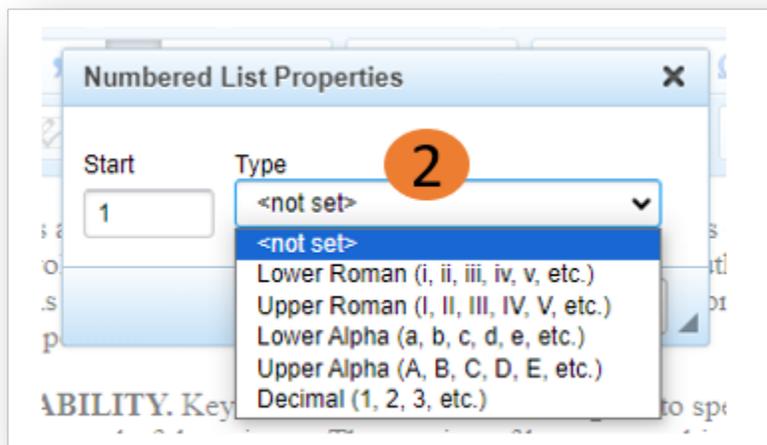
1. The cash policy provides a broad framework for management to follow in formulating and implementing prudent procedures and will comply with surety bond requirements.
2. **CASH LIMITS.** The Board expects [[CUname]] (Credit Union) to operate within insurance and approved cash limits. However, the Board recognizes that seasonal fluctuations in cash requirements may occur. In such cases, management must formally document and submit to the Board reasons for deviations and associated insurance adjustments, as needed.
3. **Total Cash.** Total cash shall be kept at a minimum. If cash levels exceed [[2120-1]] % of the total asset portfolio, management should take immediate steps to increase cash levels to meet the policy. If a significant deviation from the policy, management should submit a report to the Board supporting additional cash needs.
4. **Vault Cash.** Vault cash should not exceed \$[[2120-2]].

Change the Number or Bullet Style

1. Highlight any list item, right-click on the highlighted text, and choose "Numbered List Properties" or "Bulleted List Properties."



2. A dialog box will open. Click the "Type" dropdown list to choose the number or bullet style to apply. For numbered lists there is an additional option to choose the starting number for the list.



3. Click "OK" to apply the selected style to the sub-list.

Double-Space Items in a Numbered List

Numbered or bulleted lists in the model content are typically double-spaced for readability. However, by default, the system will single-space each item in a numbered or bulleted list.

Note: It is recommended to take care of spacing as the last step, after all list items are added, positioned correctly, and the preferred style applied.

1. Place your cursor at the end of the first item that is single spaced. Hold the SHIFT key as you press ENTER (SHIFT+ENTER). This will drop the cursor down one line without creating a new item in the list, effectively creating a double space.
2. Use the space bar to add a "space" in the newly created line break. Some printers will not recognize the SHIFT+ENTER code and will remove double-spacing during printing. The "space" character acts as a placeholder, keeping the double space intact.