



Callahan & Associates CLO Roundtable Attendee Information

March 20-21, 2018

Bruce Wolfe, VP

Heritage Trust Federal Credit Union (\$594M, SC)



How long have you been with your credit union (and any relevant experience you'd like to share)?

What is your primary role & responsibilities?

In my free time, I enjoy...

Cathy Hufstetler, VP, Lending

121 Financial Credit Union (\$551M, FL)



How long have you been with your credit union (and any relevant experience you'd like to share)? 26 years.

What is your primary role & responsibilities? Mortgage lending, selling participations (auto loans), Loss mitigation, indirect lending, collections.

In my free time, I enjoy... Running, reading.

David Brydun, VP, Consumer Lending

BCU (\$2.9B, IL)



How long have you been with your credit union (and any relevant experience you'd like to share)? 10 years.

What is your primary role & responsibilities? Currently have product management responsibility for BCU's auto loan, credit card, unsecured, and student loan product lines, as well as the underwriting, processing, servicing, and collections support functions. Prior experience includes leading our sales call center, and prior to that primarily collections - both at BCU and at a large captive finance company.

In my free time, I enjoy... Trying to get better at golf.

Drew Putt, Chief Lending Sales Officer

Georgia's Own Credit Union (\$2.3B, GA)



How long have you been with your credit union (and any relevant experience you'd like to share)? 5 months.

What is your primary role & responsibilities? 20+ years banking - Wachovia, RBC, First Citizens.

In my free time, I enjoy... Traveling, walking, spending time with 3 kids, reading.

Heather Sullivan, SVP – Consumer Lending

Randolph-Brooks Federal Credit Union (\$8.6B, TX)



How long have you been with your credit union (and any relevant experience you'd like to share)?

What is your primary role & responsibilities?

In my free time, I enjoy...

Herb White, CLO

Sharonview Federal Credit Union (\$1.4B, SC)



How long have you been with your credit union (and any relevant experience you'd like to share)? One year.

What is your primary role & responsibilities? I've been in the industry for roughly five years.

In my free time, I enjoy... Snow skiing.

James Wood, VP, Lending

Clearview Federal Credit Union (\$1.1B, PA)



How long have you been with your credit union (and any relevant experience you'd like to share)?

What is your primary role & responsibilities?

In my free time, I enjoy...

Jerry Harmon, CLO

State Employees' Credit Union (\$37B, NC)



How long have you been with your credit union (and any relevant experience you'd like to share)? 40 years.

What is your primary role & responsibilities?

In my free time, I enjoy... Going to the mountains and playing with my grandchildren.

Jim Wilmot, VP, Lending

Arlington Community Federal Credit Union (\$294M, VA)



How long have you been with your credit union (and any relevant experience you'd like to share)? I have been at this credit union for 8 years.

What is your primary role & responsibilities? I've worked at two other credit unions in Tucson and Houston and one bank (NCNB, NationsBank, BofA) in south Florida.

In my free time, I enjoy... hiking the local trails with my two chocolate labs, watch my nieces play competitive volleyball, and working in the yard and on home improvement projects.

Josh Boland, VP, Consumer Lending

Sharonview Federal Credit Union (\$1.4B, SC)



How long have you been with your credit union (and any relevant experience you'd like to share)?

What is your primary role & responsibilities?

In my free time, I enjoy...

Neekia McCoy, Chief Operations Officer

CommonWealth One Federal Credit Union (\$348M, VA)



How long have you been with your credit union (and any relevant experience you'd like to share)? Ms. McCoy joined the credit union in May 2016.

What is your primary role & responsibilities? As COO she oversees lending, account servicing, collections, retail sales, the member contact center and facilities. Ms. McCoy has over 25 years' experience in the financial services industry. She has held key leadership positions with several Fortune 500 companies including SunTrust, BB &T and Bank of America. She is a dedicated

professional, who is committed to helping our members achieve their financial goals.

In my free time, I enjoy... In her spare time, she enjoys traveling, landscape design and spending time with family.

Norm Creveling, Chief Lending Officer

Wings Financial Credit Union (\$4.5B, MN)



How long have you been with your credit union (and any relevant experience you'd like to share)? I started this past November, so 4 months now.

What is your primary role & responsibilities? Prior to my position with the Credit Union I was the President of Toyota Commercial Finance.

In my free time, I enjoy... Volunteering as a Police Officer. Prior to my move to MN I was on the SWAT team in Southern California.

Paul McDonald, VP, Residential and Consumer Lending

Jeanne D'Arc Credit Union (\$1.3B, MA)



How long have you been with your credit union (and any relevant experience you'd like to share)? I have been with the Credit Union for 14 years. Mostly in Residential and Consumer Lending with a dash of Collections.

What is your primary role & responsibilities? Prior to the Credit Union, I spent 15 years at a community bank – mostly in lending as well. We have utilized Student Choice for about 5 years for student loans. We have run our Indirect Auto Lending program through a CUSO for about 5 years as well. Our mortgage portfolio makes up a large portion of our loan volume.

In my free time, I enjoy... Running, currently I am training for the Boston Marathon in April. I also love to golf.

Stuart Graham, AVP, Consumer Loan Operations

Sharonview Federal Credit Union (\$1.4B, SC)



How long have you been with your credit union (and any relevant experience you'd like to share)?

What is your primary role & responsibilities?

In my free time, I enjoy...

Travis Barbare, VP, Lending

SC Telco Federal Credit Union (\$367M, SC)



How long have you been with your credit union (and any relevant experience you'd like to share)? Travis Barbare is the VP of Lending at SC Telco FCU. Travis received his B.S. in Business Management from the University of South Carolina – Upstate. He also completed the three-year management program at the Southeast CUNA Management School in 2015.

What is your primary role & responsibilities? Travis is responsible for the commercial, mortgage and consumer loan operations along with Collections. He joined SC Telco FCU in 2009 and has over twenty-four years of experience in the financial services industry. As VP of Lending, Travis is responsible strategic

planning to ensure the credit union achieves overall loan growth and lending objectives.

In my free time, I enjoy... Travis is an active member of Kiwanis and currently resides in Greer, SC. In his free time, he enjoys golfing and spending time with his wife Suzanne and their three children – Chase (10), Makayla (8) and Cameron (5).

Will Scott, AVP, Commercial Lending

SRP Federal Credit Union (\$857M, SC)



How long have you been with your credit union (and any relevant experience you'd like to share)? Just arrived three weeks ago!

What is your primary role & responsibilities? Key member of the Executive Management Team. Strategic planning, asset/liability management, budgeting, change management, employee compensation, regulatory agencies, and communications with the Board of Directors. Prior to SRP, I was VP of Lending at ASI Federal Credit Union.

In my free time, I enjoy... Family, media – Netflix, Amazon Prime, digital marketing, working out.

Theodora Ezekwerre, SVP

Agriculture Federal Credit Union (\$326M, DC)



How long have you been with your credit union (and any relevant experience you'd like to share)? 26 years.

What is your primary role & responsibilities? Lending, retail branches and marketing.

In my free time, I enjoy... Reading, learning new things and gardening.

Alix Patterson, Partner

Callahan & Associates



How long have you been with your credit union (and any relevant experience you'd like to share)? Almost 20 years with two sabbaticals – one to get married (2001) and one to do a one-year MBA program at Oxford University (2005/6).

What is your primary role & responsibilities? I am one of four Partners at Callahan and currently oversee what we refer to as the “core business” – all our software, publications, and events – along with the marketing & engagement team. I also do quite a few speaking and consulting engagements each year, as do the rest of the Partners!

In my free time, I enjoy... Binge watching shows while cooking (thank you Scott for the wireless headphones/iPad set up in the kitchen!), photography, reading and attending my kids sporting events. I have a bad habit of succumbing to Amazon book sales and have 72 unread books on my Kindle.

Victoria Taylor, Marketing & Engagement Manager

Callahan & Associates



How long have you been with your credit union (and any relevant experience you'd like to share)? I have been with Callahan & Associates for 7 years. Before that, I worked for a management consulting company on their client engagement and strategy team.

What is your primary role & responsibilities? As a member of Callahan's marketing team, I focus on email communications with clients and prospects, digital and web strategies, social media (LinkedIn), and media outreach. I also manage the team that plans, recruits, and executes all our events like this Roundtable, training boot camps, and webinars. I am one of Callahan's remote employees and work from home in Greensboro, North Carolina.

In my free time, I enjoy... My husband and I just bought a house, so I spend all my free time unpacking boxes, looking at furniture online, mowing my new yard (.33 acres!), and learning to be a good homeowner.