



Callahan & Associates CFO Roundtable Attendee Information

Sept. 12-13, 2018

Aaron Sato, SVP, Finance & Accounting/CFO

SF Fire Credit Union (\$1.3B, CA)



How long have you been with your credit union (and any relevant experience you'd like to share)? Since July 2017.

What is your primary role & responsibilities? SVP of Finance and Accounting.

In my free time, I enjoy... Exercise, traveling, and trying new things.

Becky Curry, SVP, Finance

ORNL Federal Credit Union (\$1.9B, TN)



How long have you been with your credit union (and any relevant experience you'd like to share)? 13 years.

What is your primary role & responsibilities? Accounting, ALM, Analytics.

In my free time, I enjoy... Playing piano and watching my boys play sports.

Beth Griffin, VP, Finance

Grow Financial Federal Credit Union (\$2.4B, FL)



Zumba and Water Skiing.

How long have you been with your credit union (and any relevant experience you'd like to share)? 32 years.

What is your primary role & responsibilities? Departments: Accounting, Wires and ACH, Capital Budget for the Organization, Enterprise Project, Management team, ALM Modeling, Allowance for Loan & Lease Losses/ CECL Implementation, Accounting for Loan Participations & Whole Loan Sales.

In my free time, I enjoy... Spending time with my husband, our dog and 3 cats, Vacationing with our daughter and her husband, Walking, Hiking, Yoga,

Bob Blacklock, SVP/CFO

1st MidAmerica Credit Union (\$722M, IL)

How long have you been with your credit union (and any relevant experience you'd like to share)? 23 years.

What is your primary role & responsibilities? Primary role CFO over accounting and facilities management.

In my free time, I enjoy... Boating and outdoors.

Harry Jacobson, CFO

Patriot Federal Credit Union (\$591M, PA)



How long have you been with your credit union (and any relevant experience you'd like to share)? 2 years with Patriot, 26 years in credit union industry.

What is your primary role & responsibilities? Finance, Accounting, ERM, Quality Control, Internal Audit, ALM, Pricing.

In my free time, I enjoy... Golf, hiking, going out to eat.

Holla Walker, SVP, CFO

Members Choice Credit Union (\$583M, TX)



Jacob Darabos, CFO

Fort Knox Federal Credit Union (\$1.4B, KY)

How long have you been with your credit union (and any relevant experience you'd like to share)? Since January 2018; previously with CASE Credit Union in Lansing, MI.

What is your primary role & responsibilities? Overall financial management, ALM, etc.

In my free time, I enjoy... Outdoor activities, cross fit, and exploring Kentucky (since I just moved here this year).

Jane Scofield, CFO

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



How long have you been with your credit union (and any relevant experience you'd like to share)? 2 years.

What is your primary role & responsibilities? I am the CFO with oversight over Accounting, Finance and HR.

In my free time, I enjoy... Travel, community service and spending time with family and friends.

Kim Alexander, EVP/CFO

Blue Federal Credit Union (\$964M, WY)



How long have you been with your credit union (and any relevant experience you'd like to share)? 12 years.

What is your primary role & responsibilities? Finance, IT, Admin, Compliance, & Investments.

In my free time, I enjoy... Running, golfing, camping, & hiking.

Marcel Theriot, VP, Finance

Generations Federal Credit Union (\$546M, TX)



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

What is your primary role & responsibilities? VP of Finance, Chairman of Insurance CUSO, Program Executive of Wealth Management Group. Responsible for ALM Modeling, Budgeting, Loan Pricing, & Investments

In my free time, I enjoy... Refereeing soccer for local leagues.

Mike O'Brien, CFO

Infinity Federal Credit Union (\$337M, ME)

How long have you been with your credit union (and any relevant experience you'd like to share)? 18 years.

What is your primary role & responsibilities? CFO, investments, alco.

In my free time, I enjoy... Live in sticks of Maine. hiking. Lakes, sticks stuff.

Randy Carswell, SVP, Finance

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)? I have been with RBFCU for 7 years.

What is your primary role & responsibilities? Currently I am the SVP – Finance and oversee Finance, Accounting, Legal, Vendor Management, and Data Governance.

In my free time, I enjoy... Golf, Stuff with my kids, Disney and Marvel movies.

Randy Gunderson, CFO

Washington State Employees Credit Union (\$2.7B, WA)



How long have you been with your credit union (and any relevant experience you'd like to share)? 9 years with WSECU preceded by 11 years at Verity Credit Union.

What is your primary role & responsibilities? I support the following functional areas: Accounting, Finance, Enterprise Project Management. I am also the Risk Officer for the organization

In my free time, I enjoy... Traveling with Family, Snow and waterskiing, Golf and Tennis

Tim Smith, CFO

Workers Credit Union (\$1.6B, MA)



How long have you been with your credit union (and any relevant experience you'd like to share)? Tim has been Senior Vice President CFO and Treasurer of Workers Credit Union since 2011. Although this is his first experience in credit union industry he spent many years with KPMG and Darling Consulting Group serving credit unions as an auditor and consultant.

What is your primary role & responsibilities? Vice President CFO and Treasurer.

In my free time, I enjoy... Giving back to the community.

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 of 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.

Sam Taft, AVP, Analytics and Business Development

Callahan & Associates



How long have you been with your credit union (and any relevant experience you'd like to share)? I've been working at Callahan since August 2014.

What is your primary role & responsibilities? I'm the AVP of Analytics and Business Development at Callahan and manage our team of analysts. This includes overseeing the data integrity of all of Callahan's software products, writing market research reports and commentary on the credit union and broader financial services industry, training and supporting all our clients' needs relating to software and custom analysis, and I also work with the

consulting arm of Callahan for strategic planning engagements.

In my free time, I enjoy... In my free time I enjoy hiking with my wife (Margot) and dog (Alf), golfing, cooking and exploring DC's food scene!

Scott Sturkie, Director, Account Management and Sales

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 since March 2016.

What is your primary role & responsibilities? As a member of Callahan's Account Management team, I am responsible for supporting large enterprise credit unions. Consistent contact with credit unions helps Callahan succeed as the leading provider of data and information to the industry.

In my free time, I enjoy... Spending time with my family, taking in new experiences and trying to keep up with my two young daughters!