



Callahan & Associates CFO Roundtable Attendee Information

June 25-26, 2018

John Meeker, SVP/CFO

Caltech Employees Federal Credit Union (\$1.6B, CA)



How long have you been with your credit union (and any relevant experience you'd like to share)? I've been at CEFCU for the past 19 years.

What is your primary role & responsibilities? Responsible for ALM, investments, risk management, collections, product pricing, accounting, budgeting, board presentations, participations loans, strategic planning etc.

In my free time, I enjoy... Golfing, watching Dodgers baseball and playing in co-ed adult soccer league.

Jim Holle, CFO

Community 1st Credit Union (\$622M, IA)



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 6 years.

What is your primary role & responsibilities? As the CFO here, I am responsible for the accounting and IT functions.

In my free time, I enjoy... Travel and spending time with my children.

Beverly Ryan, CFO

Educational Employees Credit Union (\$2.9B, CA)

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? CFO – ALM, investments, strategic planning, financial reporting.

In my free time, I enjoy... Travel, quilting.

Marty Wye, President & CEO

InFirst Federal Credit Union (\$169M, VA)



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...

Alex Mendes, CFO

Inspirus Credit Union (\$1.2B, WA)

Tim Green, CFO

KeyPoint Credit Union (\$1.2B, CA)

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 five years.

What is your primary role & responsibilities? I am CFO and have oversight over Accounting, Treasury, FP and A, Risk and Corporate Facilities.

In my free time, I enjoy... I just bought a house, so I spend my free time fixing it up hoping nothing more breaks.

Sara Dolan, CFO

Michigan State University Federal Credit Union (\$3.8B, MI)



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? As Chief Financial Officer, I am responsible for financial reporting, ALM and liquidity, business intelligence, and payments.

In my free time, I enjoy... Spending time with my family: we have four kids so it's very busy at our house! I also enjoy attending MSU events, and reading.

Joseph DeMichele, CFO

Northrop Grumman Federal Credit Union (\$1.1B, CA)



How long have you been with your credit union (and any relevant experience you'd like to share)? I've been with Northrop Grumman FCU for 3 years.

What is your primary role & responsibilities? I'm responsible for accounting, budgeting, finance, investments and ALM.

In my free time, I enjoy... Outside of work I mostly do what my kids are doing, but also play soccer and basketball, and like to go skiing and hiking when I can.

Qing Lu, CFO

Northwest Community Credit Union (\$1.1B, OR)



How long have you been with your credit union (and any relevant experience you'd like to share)? I've been with Northwest Community Credit Union for 3.5 years now with first two years as controller and recent year and half as CFO.

What is your primary role & responsibilities? I'm responsible for Financial reporting, ALM management, Loan and deposit product design, profitability analysis and pricing strategies, branch profitability analysis, tax reporting.

In my free time, I enjoy... Triathlon practice, yoga, Taikudo, travelling and listening to music.

Brian Hershfield, CFO

NuVision Federal Credit Union (\$1.5B, CA)



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? CFO over Finance and accounting. IN the past I have also had IT and Collections. I also work with the merger integration efforts.

In my free time, I enjoy... Spending time with the family, travel, golf, exercise.

Bonnie Humphrey-Anderson, EVP/CFO

Oregon State Credit Union (\$1.18B, OR)

Susan Gruber, CFO

Patelco Credit Union (\$6B, CA)

How long have you been with your credit union (and any relevant experience you'd like to share)? Almost 4 years.

What is your primary role & responsibilities? EVP/CFO in charge of Accounting, Financial Analysis, Regulatory Reporting, Risk, Internal Audit, Vendor Management, Investments, Corporate Real Estate (including facilities).

In my free time, I enjoy... Spending time with my family and enjoying Northern California's beautiful outdoors, especially wine country.

Eric Corrales, Manager, Treasury Operations

SchoolsFirst Federal Credit Union (\$14B, CA)



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? All financial planning and analysis activities that includes budget and forecasting, project management for the finance division, secondary marketing, loan and share pricing, profitability, and adhoc analysis.

In my free time, I enjoy... Typical call dad and family comment. Which including coaching my sons little league team, occasionally planting a flower or tree and hoping it won't die, video games with the boys, and an occasional dinner and movie with my wife.

Brian Ross, EVP/CFO

Star One Credit Union (\$8.9B, CA)



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? I'm the Executive Vice President and Chief Financial Officer for Star One Credit Union, one of the largest credit unions in Silicon Valley with approximately \$9 billion in assets. My current duties include overseeing Finance, Marketing, IS and the Administration Departments. Primary functions including treasury, accounting, strategic marketing, facilities and information systems and security among others for the credit union. Prior to joining Star One in January of 2005, I held several leadership positions in various financial institutions in California. I'm a Chartered Financial Analyst (CFA) and a Credit Union Enterprise Risk Management Expert (CUERME). I recently graduated from the CUES CEO Institute in May of this year.

In my free time, I enjoy... My wife Amber and I are very proud parents of two girls, Lindsay (11) and Natalie (7). Lindsay is an excellent student, soccer player and competitive dancer. Dance keeps her busy most evenings and weekends as she dances with her team at competitions throughout the Bay Area. Natalie is a very outgoing 2nd grader and enjoys playing soccer and keeping her parents on their toes at all times. We live in Pleasanton, CA where I volunteer as the PTA Treasurer of our local elementary school and a soccer coach for Natalie's recreational soccer team.

My hobbies include scuba diving, swimming, soccer, fishing, walking and cheering on my girls. I commute to work by train which affords me about 2 hours each day to either catch up on work or enjoy listening to inspirational and fiction audio books. When not at work, I like to spend time with the family at our cabin near Twain Harte, hiking, horseback riding or fishing in the high Sierra.

Gina Bloomfield, CFO

UNCLE Credit Union (\$403M, CA)



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? CFO- Financial reporting, Liquidity, IRR management, Investment, Borrowing, Lending related activities.

In my free time, I enjoy... Golfing, hiking, kayaking.

Tom Kuslikis, VP Accounting And Finance

University Of Michigan Credit Union (\$793M, MI)

How long have you been with your credit union (and any relevant experience you'd like to share)? 4.5 years.

What is your primary role & responsibilities? I am the VP of Accounting and Finance. The Accounting and Finance and Audit and Compliance departments are under my umbrella of responsibility.

In my free time, I enjoy... Spending time with my wife and 4 children. I also love to read.

Brett Wheeler, CFO

USAlliance Financial Credit Union (\$1.3B, NY)



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

What is your primary role & responsibilities? My primary role and responsibilities include balance sheet management and financial performance. This includes leading the ALCO and developing strategies to achieve asset and net income goals.

In my free time, I enjoy... Cycling.

Vic Israni, CFO

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



How long have you been with your credit union (and any relevant experience you'd like to share)? 4 years.

What is your primary role & responsibilities? Chief Financial Officer, Investments, Accounting, ALM, Budgeting/forecasting and Electronic payments.

In my free time, I enjoy... Reading, travel and golfing.

Alexandra Selby, VP, Marketing

Callahan & Associates



How long have you been with your credit union (and any relevant experience you'd like to share)? Alexandra (Alex) is vice president of marketing & engagement. She leads a team of marketers and communication specialists at Callahan & Associates. With more than 7 years of credit union experience, Alex helps shape the positive interactions between Callahan and its current and prospective clients.

What is your primary role & responsibilities? A frequent contributor to CreditUnions.com, Alex also represents the organization across the country at industry events, providing insights and thought leadership on key areas such as brand management, peer financial analysis, key credit union trends, and more. She is passionate about improving credit union performance and using data to solve problems.

In my free time, I enjoy... Alex recently moved to San Francisco with her husband. In her free time, she enjoys spending the weekends exploring with her husband and puppy, Gatsby.

Jay Johnson, Partner

Callahan & Associates



How long have you been with your credit union (and any relevant experience you'd like to share)? Jay has more than 22 years of financial industry experience working at top 20 banks and within the credit union industry.

What is your primary role & responsibilities? Jay plays a few roles: 1) I lead our consulting practice, working with Executive teams and Boards on strategic planning, 2) work with the Callahan CUFSLP partnership to address strategic industry issues and identify opportunities for collaborating on solutions, 3) serve as President of Trust for Credit Unions mutual funds, a family of investment options designed by and for CUs, and 4) as a C&A partner, help to shape the company's direction.

In my free time, I enjoy... Running (from 5k to marathons), skiing, attending almost any sporting event, and following U2, The Rolling Stones and Bruce Springsteen when they tour.