



## Callahan & Associates CLO Roundtable Attendee Information

June 26-27, 2018

### Anne McClure, Acting CEO

*Cabrillo Credit Union (\$275M, CA)*



**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?** I was just promoted to acting CEO. Previously I was responsible for retail operations, human resources & overseeing training. I oversaw lending for a short time but have just hired a CLO who will be joining us mid-June.

**In my free time, I enjoy...** Watching my kids play in their sporting activities (my youngest just graduated from HS!), going to the movies, and travelling.

### Ethan Morriss, CLO

*CapEd Federal Credit Union (\$662M, ID)*

### Jill Johnson, CLO

*Community Financial Credit Union (\$856M, MI)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** 17 years.

**What is your primary role & responsibilities?** CLO over underwriting, processing (real estate and commercial), closing (real estate and commercial), servicing and collections of all lending for our credit union.

**In my free time, I enjoy...** The lake, moved to a new (to us) home in November!

## **Jason Bierman, Chief Administrative Officer**

*Corning Federal Credit Union (\$1.3B, NY)*

## **Caleb Cook, VP Of Mortgage Lending**

*Digital Federal Credit Union (\$8.2B, MA)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** I have been with DCU for 4 amazing years. This is my 16th year being part of the credit union movement

**What is your primary role & responsibilities?** My primary role is anything to do with mortgages and home equity loans. From loan origination, pricing/secondary marketing/loan delivery, processing, underwriting, closing, and servicing.

**In my free time, I enjoy...** Travelling by planes, trains and automobiles to anywhere and everywhere, and spending time with my wife and kids.

## **David Dekker, SVP Of Consumer Services**

*Interra Credit Union (\$1B, IN)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** I have been with Interra for 14.5 years.

**What is your primary role & responsibilities?** SVP of Consumer Services—I am over our Consumer & Residential Mortgage teams and our Contact Center and Virtual Branch (our contact center is focused on member service primarily as well as the expectation to refer products/services and the virtual branch handles all incoming consumer loan applications/on-line applications/on-line membership/outbound sales initiatives).

**In my free time, I enjoy...** Spending time with my wife and 3 children (1 girl-15 and 2 boys-5 & 3). I also enjoy following Michigan sports, Detroit Red Wings Hockey and Detroit Lions Football as well as playing golf and tennis as often as I can. Lastly, being an active member of my church family and serving God.

**David Luu, CLO**

*KeyPoint Credit Union (\$1.2B, CA)*

**Andrea Mosher, SVP of Lending**

*Lake Trust Credit Union (\$1.8B, MI)*

**Teri Rapp, Chief Credit Officer**

*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)?** I have been with Nuvision for 10 years as Chief Credit Officer.

**What is your primary role & responsibilities?** My Title and role is Chief Credit Officer on the Executive Leadership Team, reporting directly to the CEO. My areas of responsibility are: Mortgage Lending, Consumer Lending (Direct and Indirect) Commercial and Business Lending, Loan Servicing, Collections and Insurance Services.

**In my free time, I enjoy...** Activities with my family (5) daughters (11) Grandchildren and (5) dogs. I'm a Huge animal lover. I am very active in Charity events and in our Community. I have a passion to Find a Cure for Cancer and I am active in Charities that support these causes. My Husband and I own a Drag Racing Team which keeps us very busy as well.

**Richard Wada, CLO**

*Patelco Credit Union (\$6B, CA)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** Since April 2018.

**What is your primary role & responsibilities?** Chief Lending Officer.

**In my free time, I enjoy...** Fly fishing and working on my golf game.

**John Cook, VP Of Lending**

*Redstone Federal Credit Union (\$5B, AL)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** 9 years and 3 months.

**What is your primary role & responsibilities?** As VP Lending, my responsibilities are to give oversight to all lending - business, consumer (except the credit card product) and mortgage and business non-credit services. The scope of oversight runs from opportunity/relationship development all the way through to collection and liquidation for business lending and mortgage lending. The scope of oversight is the same for consumer lending except does not include loan processing and closing.

**In my free time, I enjoy...** Woodworking, golf and some reading.

**Divine David, SVP/CLO**

*Santa Clara County Federal Credit Union (\$725M, CA)*

**Lee Pierce, SVP, Lending**

*Seattle Credit Union (\$861M, WA)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** I've held a variety of positions over my 23 year career with Seattle Metropolitan Credit Union.

**What is your primary role & responsibilities?** As the SVP of Lending, I currently oversee Real Estate, Consumer Lending, Accounts Recovery, and Credit Risk Management.

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

**Kathy Chen, SVP, Lending**

*SF Police Credit Union (\$878M, CA)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** I have been with SF Police Credit Union for exactly a year today.

**What is your primary role & responsibilities?** I lead the lending division, which includes real estate and consumer lending.

**In my free time, I enjoy...** Backpacking, running, hiking, skiing, traveling, shopping and watching episodes of Fixer Upper (over and over).

**Ellen Yacovone, CLO**

*Tucson Federal Credit Union (\$434M, AZ)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** A little over eight years.

**What is your primary role & responsibilities?** Oversight of the lending, loan servicing, and collections departments.

**In my free time, I enjoy...** Quilting and spending time in our mountain cabin.

**Diane Sokolik, AVP, Consumer Lending**

*TwinStar Credit Union (\$1.2B, WA)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** 15 years.

**What is your primary role & responsibilities?** Portfolio management, credit risk analysis and product (project) management.

**In my free time, I enjoy...** Golfing and reading a good book.

## **Matt Isika, VP, Lending**

*Yolo Federal Credit Union (\$284M, CA)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** Matt has worked for Yolo FCU since 20016 and graduated from California State University, Sacramento with a Bachelor's degree in Economics. He has been in the credit union industry since 1999 and has served as volunteer for several nonprofit organizations. He has conducted workshops in the areas of credit counseling and homebuyer education seminars.

**What is your primary role & responsibilities?** In addition to overseeing the Marketing and Collections Departments, Matt is responsible for all areas of lending including consumer, real estate, and commercial business lending.

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

## **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?** I play a few roles: 1) I lead our consulting practice, working with Executive teams and Boards on strategic planning, 2) I 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.