



Callahan & Associates Marketing Roundtable Attendee Information

Sept. 11-12, 2018

Anne Hagen, VP, Marketing

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



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? Vice President of Marketing – leads a marketing team that is dedicated and committed to the CU's strategic goals. During the last couple years, the focus of the marketing team has been on the credit union's new brand, growing core deposits and loans, educating the membership, finding ways to improve the member experience, and launching new products to serve the underserved.

In my free time, I enjoy... Running, biking, hiking, gardening – basically doing anything outdoors. I also enjoy traveling.

Roger Rassman, VP, Marketing

Community First Credit Union of FL (\$1.5B, FL)



How long have you been with your credit union (and any relevant experience you'd like to share)? I have been with Community First for 6 years. I have worked financial institutions marketing for 34 years.

What is your primary role & responsibilities? I am part of the Senior Executive Team. My primary role is marketing which includes all the traditional aspects plus research, business development, innovation, our foundation and community affairs. I am also driving the use of machine learning within marketing and we are seeing some encouraging results.

In my free time, I enjoy... Travel, wine collecting, fishing and golf.

Cheryl Frame, AVP, Marketing

Deere Employees Credit Union (\$940M, IL)



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

What is your primary role & responsibilities? Marketing, branding, advertising, member research, database (Raddon) Management, Branch Marketing, Investment Group marketing/campaign coordination.

In my free time, I enjoy... Hanging with the family, friends and just being home.

Amy Karikov, Director Of Marketing Operations

ENT Credit Union (\$5B, CO)



How long have you been with your credit union (and any relevant experience you'd like to share)? I have been with Firstmark almost 1.5 years. Prior to joining Firstmark, I was the Director of Marketing for a very large Urgent Care Provider. The provider had clinics in 3 markets and I managed all the aspects of Marketing for this provider.

What is your primary role & responsibilities? At the credit union my primary role is to oversee the direction of the credit union brand. Specifically focusing on brand voice, brand guidelines, marketing collateral, and more. I oversee the Marketing budget, credit union promotions, social media strategy, website development.

In my free time, I enjoy... When I am not working, I enjoy spending time with my husband, 2 children, and our friends.

Eve Hernandez, VP, Marketing

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



How long have you been with your credit union (and any relevant experience you'd like to share)? I've been with Generations FCU for 18 months. However, I've been the "startup" VP of Marketing for eight months (GFCU did not have a traditional marketing department for a year). I was VP of Marketing at GFCU for nine years before joining another credit union, and I'm happy to be back at Generations.

What is your primary role & responsibilities? I'm VP of Marketing charged with brand identity and awareness, product and service marketing, marketing communications and public relations. My department manages traditional and online advertising, website, email marketing and social media platforms, in addition to analytics related to digital marketing, member surveys and product/service usage.

In my free time, I enjoy... Consuming information via books and podcasts (when I'm not at work or working towards my Master of Public Administration at UT San Antonio).

Mandy Zurbick, SVP, Chief Marketing Officer

GTE Financial Credit Union (\$1.9B, FL)



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? As Chief Marketing Officer, I am a leading champion of the credit union's corporate image and brand. I provide leadership in member communications, creation and execution of marketing strategies, innovative product development, brand-aligned advertising, notable public relations, and relevant sales support.

In my free time, I enjoy... Volunteering for Southeastern Guide Dogs and baking delicious cupcakes.

Holly Smith, VP, Marketing

Heritage Federal Credit Union (\$549M, IN)



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

What is your primary role & responsibilities? Marketing and Business Development.

In my free time, I enjoy... Glamping and boating.

Christine Sparks, Marketing Manager

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



How long have you been with your credit union (and any relevant experience you'd like to share)? 11 years

What is your primary role & responsibilities? Managing all aspects of digital and print marketing.

In my free time, I enjoy... Spending time with my family and friends, preferably near water! Reading and watching HGTV or Netflix. Kick boxing, prior to breaking my wrist. Horseback riding, on the rare occasion I get away to do so.

Meegan Siegwarth, VP, Marketing/Member Experience

Interra Credit Union (\$1B, IN)



How long have you been with your credit union (and any relevant experience you'd like to share)? I've been at Interra Credit Union for 2 ½ years. Previously I worked for 17 years at a community bank in Marketing.

What is your primary role & responsibilities? I oversee the strategy and implementation of projects for all marketing, digital and communications for the organization.

In my free time, I enjoy... I enjoy spending time with my family, cheering for Indiana University, gardening and listening to music.

Michelle Silveira, SVP, CMO

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)? 32 years (33 in October) – I think the most relevant experience I have had in my career is overseeing the rebranding of our Credit Union. Since we are the 3rd oldest CU in the nation (founded in 1912), we wanted to remain true to our heritage. A name change was off the table. However, a refreshing of the brand was something needed to attract a younger demographic as well as not to look outdated or in other terms “look our age.” In 2009 we transformed our logo, updated our tagline to reflect our past, and refreshed our color pallet and fonts. The transition was huge but more

importantly it was accepted by staff, board and our membership.

What is your primary role & responsibilities? I oversee Marketing, Financial Education, High School Branches, Administrative Services, which include Facilities and The We Share A Common Thread Foundation and Volunteerism.

In my free time, I enjoy... Traveling and Fishing.

Sharon Keller, VP, Marketing

Keesler Federal Credit Union (\$2.5B, MS)



How long have you been with your credit union (and any relevant experience you'd like to share)? 29 years.

What is your primary role & responsibilities? I oversee Advertising, Marketing Data Analysis, Public Relations, Donations and Sponsorships, Financial Education, Digital Marketing (includes Marketing Automation, predictive analytics, website creation and maintenance and social media) and copywriting for all credit union communication.

In my free time, I enjoy... If I have free time, I enjoy the outdoors (going out on a Waverunner, hiking, etc), working out, reading novels and singing in a community chorale. Anything that involves family gatherings at the beach or in the mountains takes top priority. On my wish list: I'd like to take some fine art classes (painting and drawing), be in a local theatre production and relearn the violin.

Fred Hagerman, SVP, CMO

Langley Federal Credit Union (\$2.5B, VA)



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

What is your primary role & responsibilities? All external marketing communication, charitable giving and digital banking.

In my free time, I enjoy... Reading, gardening, outdoor recreational activities

Deidre Davis, CMO

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)? I have been with Michigan State University FCU about 4.5 years. Prior to this CU, I was with Notre Dame FCU for 14 years.

What is your primary role & responsibilities? As Chief Marketing Officer, I implement effective marketing and communication strategies addressing both strategic and tactical business initiatives and opportunities. I am responsible for all marketing and communication projects and promotions, including determining marketing strategy, media buying, print and digital delivery of marketing messages, market research, web and mobile content, social media, and external public relations campaigns and communications.

In my free time, I enjoy... Hanging out with husband, friends, and family, reading, shopping, dining (in or out), getting nails done, and planting and caring for outdoor (garden-type) flowers.

Thomas Chung, Marketing Analyst

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



How long have you been with your credit union (and any relevant experience you'd like to share)? I have been with Santa Clara County Federal Credit Union for about 13 years.

What is your primary role & responsibilities? My primary role is Marketing Analyst, taking care of MCIF and analytics but have worn several different hats in the past year including digital, social, and overall communications.

In my free time, I enjoy... Exploring new places, trying new foods and meeting new faces.

Danielle Moreno, Marketing Manager

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



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? My main role is to manage/develop creative for product promotions. I also manage all internal marketing communications, branch merchandising, as well as credit union special events.

In my free time, I enjoy... Surfing, hiking, and spending time with my friends and family.

Vicki Lovett, CLO

Suncoast Credit Union (\$8.7B, FL)



How long have you been with your credit union (and any relevant experience you'd like to share)? 37 years.

What is your primary role & responsibilities? CLO, mortgage, consumer, indirect, credit cards, business development including business services, 3 CUSOs.

In my free time, I enjoy... Gardening, cooking, spending time with friends, traveling.

Marc Wilensky, VP, Communications & Brand Marketing

Tower Federal Credit Union (\$2.9B, MD)



How long have you been with your credit union (and any relevant experience you'd like to share)? Over 2 years with my current CU, 4.5 years with my previous credit union – Board Member of the Marketing Association of Credit Unions (MAC). 28 years of retail marketing experience.

What is your primary role & responsibilities? VP Communications and Brand Marketing – I oversee our in-house full-service advertising agency. We support various internal business lines (Real Estate and Consumer Lending being most prevalent) utilizing some sixteen marketing channels.

In my free time, I enjoy... Cooking, baking and spending time with my wife and two boys (3 and 8).

Amy Grose, AVP, Marketing

Truity Credit Union (\$776M, OK)

Miguel Cruz, VP, Marketing

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



How long have you been with your credit union (and any relevant experience you'd like to share)? 4 Years, 9 days and 2 hours and counting...30 sec...

What is your primary role & responsibilities? As VP of Marketing I am responsible for driving the development and execution of TFCU's marketing strategic plan and initiatives to support business strategies involving TFCU communication, marketing, social media, brand management, and business development efforts that will increase profitability and member growth. Foster effective community relations strategies to further TFCU's cultural initiative of

community investment and education.

In my free time, I enjoy... I like to spend time with family – two daughters, and lovely wife – read, listening to music, dance, going to concerts, travel.

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!