



## Callahan & Associates Risk Roundtable Attendee Information

October 22-23, 2018

### **Donna Holmes, VP, Risk**

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

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

**What is your primary role & responsibilities?** I oversee all of risk which includes compliance, ERM, and internal audit.

**In my free time, I enjoy...** Traveling, hiking, gardening, being with family (especially my grandkids).

### **Erin Fuller, VP, Human Resources**

*Empower Federal Credit Union (\$1.6B, NY)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** I've been at Empower for 2 ½ years, but before that I was with Altura C.U. for 23 years.

**What is your primary role & responsibilities?** V.P. Human Resources over HR and Training with a few other administrative responsibilities.

**In my free time, I enjoy...** I love to shop and go out to dinner. Living in the Northeast, I cherish the sun too☺.

**Pat Hanulik, AVP-Risk and Compliance**

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



**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?** I oversee all compliance and vendor management functions as well as managing the ERM function and serving as the Chair of the ERM Committee.

**In my free time, I enjoy...** I enjoy skiing, boating and most of all spending time with my wife and twin 11-year-old daughters.

**Daniel Tschopp, Sr. VP, Enterprise Risk Management**

*Logix Federal Credit Union (\$5.3B, CA)*



**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?** I'm the Head Logix' ERM division which houses all Risk Management Operations (Fraud, Internal Audit, Insurance, Collections, BCP, BSA, Insurance and Loan Quality).

**In my free time, I enjoy...** Traveling, hiking, and some community work.

**Michael Hoagland, Sr. Director of Risk**

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

## **Lisa Sunderman, VP, Enterprise Risk Management**

*Numerica Credit Union (\$2B, WA)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** 6 years with Numerica, Publicly traded bank holding company, insurance company, and public accounting prior experience

**What is your primary role & responsibilities?** ERM including credit risk monitoring, ALLL, lending and account opening QC, manage outsourced Internal Audit

**In my free time, I enjoy...** Ski, bike, run, travel with husband and teens, community.

## **Cathy Dominguez, CRO**

*Nuvison Federal Credit Union (\$1.5B, CA)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** She has held positions at Great Western Bank, Cal Fed Bank, Union Bank, Long Beach Mortgage and Kinecta Federal Credit Union, where she was a member of the Executive Leadership Team. She has held senior level roles overseeing member services, retail channels, marketing, product management, back-office operations, risk management and insurance and investment services. Cathy holds a CUERME designation, earned her life and casualty licenses and Series 7 license and holds an MBA from Pepperdine University.

**What is your primary role & responsibilities?** Cathy serves as Chief Risk Officer for Nuvison Federal Credit Union. Her career has been predominantly in the financial services industry ranging from regional banks and mortgage companies to credit unions.

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

**Tiffany Shirley, VP of Risk Management**

*Oregon State Credit Union (\$1.1B, OR)*



read and cook!

**How long have you been with your credit union (and any relevant experience you'd like to share)?** I just celebrated my 22nd anniversary at the credit union but I've been in current role for just over two years.

**What is your primary role & responsibilities?** I am the Vice President of Risk and oversee BSA, compliance, vendor management, ERM, auditing, business continuity and disaster recovery, fidelity bond and property coverage and fraud management.

**In my free time, I enjoy...** I love watching OSU sports, particularly football and baseball (go Beavs!) and hiking when the weather is not too bad. I also love to

**Troy Garry, CFO**

*Sound Credit Union (\$1.4B, WA)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** I have been with Sound Credit Union for 6 years.

**What is your primary role & responsibilities?** EVP/CFO – Accounting/Finance, Business Intelligence, Facilities, Risk Management and Compliance.

**In my free time, I enjoy...** Spending time traveling with my family (wife and two daughters) and playing golf any chance I get.

## Philip Melugin, SVP of Risk Management

*Texas Trust Credit Union (\$1.2B, TX)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** About 6 years.

**What is your primary role & responsibilities?** I'm the SVP of Risk Management. My primary role is advising the Board and Executive Management team on current and potential risks and strategies to optimally manage them. My team and I are responsible for the oversight of ERM, Audit, Compliance, Legal and Insurance (and other duties as assigned).

**In my free time, I enjoy...** Restoring old cars, playing softball and spending time with my family.

## Daniela Parker, AVP, Risk Management

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



**How long have you been with your credit union (and any relevant experience you'd like to share)?** I have been with TwinStar Credit Union for 14 years.

**What is your primary role & responsibilities?** I lead a team of risk management professionals and manage and direct the credit union's ERM Program, Business Continuity Planning Program, Compliance, Fraud, BSA, Safety and Vendor Management.

**In my free time, I enjoy...** Spending time with my family, the outdoors, travel.

**Andrea Brooks, VP, Risk Management**

*UNCLE Credit Union (\$403M, CA)*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** I've been with UNCLE for 6 years.

**What is your primary role & responsibilities?** Compliance, Audit, Enterprise Risk Management, Business Continuity, Bank Secrecy Act/OFAC Compliance.

**In my free time, I enjoy...** Spending time with my husband of 18 years, and our two golden retrievers, Zen and Zoey.

**James Alexander, SVP/Chief Risk Officer**

*Unitus Community Credit Union (\$1.1B, SVP/Chief Risk Officer)*

**Bryan Hubbard, Underwriting Manager**

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

## 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.

## 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.

**Rebecca Wessler, AVP/Editor-In-Chief**

*Callahan & Associates*



**How long have you been with your credit union (and any relevant experience you'd like to share)?** I've been with Callahan for 9 years next week (Nov. 1). I've got a master's degree in journalism and have worked for a variety of publications in my career, including trade pubs, business journals, niche magazines, and city papers.

**What is your primary role & responsibilities?** I am the editor for Callahan's media products. I follow industry trends and listen to what's buzzing. I'm always on the hunt for stories of exemplary credit unions with exemplary strategies, which Callahan shares via CreditUnions.com, Credit Union Strategy & Performance, Callahan's Credit Union Directory, Supplier Market Share Guides, and more. I'm also the resident librarian for "things we've written about."

If you're not registered for the CreditUnions.com newsletter, you're missing out. Join us!

**In my free time, I enjoy...** I have 3 children ages 7, 5, and 4. I have no free time! I do enjoy reading and have several television programs I'd like to catch up on. Before I had kids, I loved a good flea market flip.