December 19, 2019

Federal lawmakers, CFPB meet with CUs during Hike the Hill

On Nov. 14, the League led a group of credit union leaders to Washington, DC, to advocate with regulators and legislators about critical issues facing Indiana credit unions. The trip featured the League’s first visit to the headquarters of the Consumer Financial Protection Bureau (CFPB) where the group met with Assistant Director Jennifer Stockett, the CFPB’s Financial Institution & Business Liaison, and other key staff members tasked with writing regulations. The discussions, led by Indiana University CU President/CEO Bryan Price who recently served on the CFPB’s Credit Union Advisory Board, focused on pending CFPB proposed rules related to debt collection and Home Mortgage Disclosure Act (HMDA) reporting, and the potential use of Unfair, Deceptive, or Abusive Acts or Practices (UDAAP) standards in CBPB rules and enforcement.

Following the meeting at the CFPB, the group headed to Capitol Hill for a round of visits with several Hoosier lawmakers. The group met with Senators Mike Braun and Todd Young as well as Representatives Jim Baird, Trey Hollingsworth (who serves on the Financial Services Committee), and Jackie Walorski (who serves on the Ways & Means Committee). Discussions in each office focused on the difference that credit unions make in the lives of their members and communities, the continuing need for data security legislation and further regulatory relief, and the issue of banks choosing to sell themselves to credit unions. “Even though there are a lot of other issues dominating the scene in Washington these days,” said League President John McKenzie, “it is very important that we continue to keep credit union issues at the top of legislators’ minds and that we remain focused on reminding them about all of the good credit unions are doing in their communities.”
NCUA’s Todd Harper visits League and CUs

NCUA Board Member Todd Harper visited Indiana in September, stopping at the League and credit unions as part of his trip. In addition to spending time at the League office, he visited Financial Health FCU and Elements Financial FCU in Indianapolis and Indiana University CU in Bloomington. In November, he paid a visit to Hoosier Hills CU (HHCU) in Bedford.

To gain more in-depth information about credit unions, Harper is visiting CUs across the country and particularly in his home state of Indiana. A native of northwest Indiana, he holds an undergraduate degree in business analysis from Indiana University’s Kelley School of Business, as well as a graduate degree in public policy from Harvard University’s Kennedy School of Government.

“It was a pleasure to host Board Member Harper at the League office and to join him as he visited credit unions throughout the state,” said League President John McKenzie. “We appreciate his commitment to listening to credit union leaders who are serving members every day.”

“We were so pleased to be able to share information about our growth and success with Todd Harper,” said George McNichols, HHCU President and CEO. “We have never had a current NCUA Board Member visit us, so it was an honor to host him at our office here in Bedford.”

During his visits, Harper shared his outlook that financial institution regulators need to operate with FIRE, which is an acronym indicating that regulators need to be fair and forward-looking; Innovative, inclusive and independent; Risk-focused and ready to act expeditiously when necessary; and Engaged appropriately with all stakeholders to develop effective and efficient regulation.

Bergl, Ryan speak at Netherlands CU conference

In September, then-League Chairman Dallas Bergl of INOVA FCU and then-Vice Chairman Kevin Ryan of Financial Center First CU traveled to The Hague in the Netherlands for the annual conference of the Dutch Association of Cooperating Credit Unions (VSK), serving as representatives of the World Council of Credit Unions. They presented a session called “Lessons learned from Credit Unions in Indiana about growth for Social Finance.” The Dutch Association Netherlands CU conference continued on page 3.
Netherlands CU conference continued from page 2

serves Dutch small- and medium-sized enterprises (SMEs). There are 18 credit unions in the Netherlands serving approximately 500 SMEs. Member business lending and business deposits are of particular importance to VSK and their member credit unions. As part of the exchange, Bergl and Ryan met with the State Secretary of Economic Affairs, who also spoke at the conference, as well as other government officials and 15-16 credit unions. They also met with Roland Lampe of the Association for Credit Unions in the Netherlands. Through the World Council’s International Training Program, Lampe came to Indiana and visited the League and Indiana credit unions in 2017.

Strong attendance at League’s first-ever Next Generation Conference

The League’s first-ever conference specifically for upcoming credit union leaders was Dec. 6, in Noblesville. The conference was developed for those who are in their first few years at the credit union, new to their position, or who may be coming to the credit union business from another financial institution or industry. It sold out with 69 attendees, who spent the day in four different sessions, each of which featured a topic designed to build knowledge, confidence and professionalism.

ULEND Academy is popular with Indiana CUs

In partnership with CUNA Mutual Group, the League offered the ULEND Academy Dec. 4-5 in Indianapolis. The session was sold out and provided attendees with a hands-on, customized experience geared toward members’ financial needs. The content covered all lending channels and all stages of the loan process including origination, underwriting and closing, with cross-selling, consultation and compliance woven throughout.

CUs meet with State Rep. Tony Cook

Credit union representatives from the League and North Central Indiana met with State Rep. Tony Cook (R-Cicero) in December. The meeting was arranged by League Board Secretary/Via CU President/CEO Dave Abernathy. This was the fourth consecutive year for Rep. Cook to meet with credit union constituents as part of the League’s Adopt-A-Legislator program. During the meeting, the group discussed issues Rep. Cook believes will be the focus of the upcoming legislative session, like education and healthcare, as well as issues expected to impact credit unions like further improvements to Indiana’s Uniform Consumer Credit Code.

State Senator visits Natco Empowerment Center

State Sen. Jeff Raatz (R-Centerville) met with constituents from Natco CU and the League to take a tour of the Natco Community Empowerment Center (NCEC) in Richmond. The visit was part of the League’s Adopt-A-Legislator program. Sen. Raatz was able to see a significant way the credit union gives back to residents of his district. During the visit, the group talked about financial literacy, and the programs the empowerment center offers.

The NCEC was created by the Natco CU in 2013 to address needs the credit union saw among its members and others in the community. It offers a variety of no-cost programs and services including connections to local immediate need resources and assistance programs, job seeking assistance, money management counseling, trainings, classes and workshops that are made available in part through funding from the United Way. The center features a comfortable environment that provides computers with Internet, copy machines and a shredder all at no cost to members of the community.
League/Servicecorp board meeting highlights

In addition to the reorganization meeting on Oct. 25 (see story below), the board of directors of the League and Servicecorp met on Dec. 10 at the League Office. Chairman Kevin Ryan of Financial Center First CU presided. At the meetings, after hearing reports from League and Servicecorp management, the board:

• Approved proposed appointments to League and Servicecorp committees.
• Approved business plans and budgets for 2020 for the League and Servicecorp.
• Authorized a modification to the IRS Code 6055/6056 reporting service for clients of the Credit Union Consortium.
• Approved the annual management agreement between the League and Servicecorp for the positions that are shared between the two organizations.
• Approved a Servicecorp dividend of $1 million, payable to the League.

League Board table officers elected

Table officers for the League board were elected Oct. 25 at the board’s reorganization meeting which took place after the annual meeting. Kevin Ryan of Financial Center First CU was elected League Chairman. Kevin Sparks of Crane CU is vice chairman; Dave Abernathy of Via CU is board secretary; and Karen Madry of Afena FCU is treasurer.

Foundation board elected during Convention

At the League board reorganization meeting Oct. 25, Andy Burggraf of CommunityWide FCU and Melissa Domingues of Solidarity Community FCU were each reelected to a three-year at-large Foundation director seat. Other Foundation Directors are Nina Baker of ProFed FCU; Karen Madry of Afena FCU, Kevin Sparks of Crane CU and Shawn Wolbert of Financial Health FCU.

A breakfast featuring the Foundation was held during Convention with more than 225 in attendance. 2019 Foundation Chairman Lori Gonzalez of Members Choice FCU provided a report highlighting the work of the Foundation and encouraged continued support through CIF deposits and other contributions.

The Foundation board also met on Dec. 16 and elected the following table officers for 2020: Chairman Burggraf, Vice Chairman Sparks and Secretary/Treasurer Baker.

ICUPAC Trustees meet, re-elect officers during Convention

The annual meeting of ICUPAC took place Oct. 25 following the ICUPAC Luncheon at Convention. ICUPAC Trustees reorganized, with current officers being re-elected as follows: Brian Crum of FORUM CU is chairman, Kevin Kosek of REGIONAL FCU is vice chairman and Amy Sink of Interra CU continues as secretary. Andy Allard of Indiana University CU and Cari Palmer of Energy Plus are Trustees.

Stabilization Trustees reorganized during Convention

At the League Board reorganization meeting on Oct. 25, the board appointed Karla Salisbury, KEMBA CU, and Trent Kerr, Indiana State University FCU, to three-year terms on the Stabilization Board of Trustees. The other Trustees are Frank Gulley of Afena FCU, Lori Gonzalez of Members Choice FCU, and Karen Madry of Afena FCU.

Rep. Andre Carson recognizes Salisbury with Congressional honor

To recognize her contributions to the League board, outgoing League Chairman Karla Salisbury received a Congressional Salisbury continued on page 5
Salisbury continued from page 4

Recognition from Congressman Andre Carson (D-7). The presentation was made by Rep. Carson’s District Director Megan Sims at the ICUPAC Luncheon during the League Convention.

In the recognition, Rep. Carson said, Salisbury’s “six years of work have left an everlasting impression on many.” He also said “Your advocacy on behalf of the credit unions and your continued dedication as CEO of KEMBA Credit Union are unmatched. Although your time on the board has come to an end, the legacy you leave is everlasting and your positivity will continue to shine through your hard work and continued service at KEMBA.”

Rep. Walorski sends video greeting to Convention attendees

On Oct. 24, as part of the morning presentation at the League’s annual Convention, attendees heard a video greeting from Congresswoman Jackie Walorski (R-2). In her remarks, she told the group, “As a life-long credit union member, I know the pivotal role you play in helping families thrive and small businesses succeed.”

Rep. Walorski has been a tremendous voice in Congress for credit unions since being elected in 2012. As a member of the tax-writing House Ways and Means Committee, she has been a strong advocate for protecting credit unions’ tax exempt status during all tax reform conversations.

First Chairman’s Global Good Award goes to Marco Dominguez

A newly established award was presented during the League Convention on Oct. 24. The Chairman’s Global Good Award was established to recognize involvement in global or domestic projects that further credit unions and their values with immigrant populations or in foreign countries. The inaugural award was presented by League Chairman Dallas Bergl of INOVA FCU, to Marco Dominguez, Director of Community Relations at Financial Center First CU.

Dominguez has made many contributions to the global credit union movement including service to the Hispanic community in Indiana, financial literacy education and global outreach. He conducts financial education weekly at the Mexican Consulate in Indianapolis. He has also traveled to Colombia to talk about financial literacy in that country, and he was a presenter at the recent World Council of Credit Unions conference, where he taught credit union leaders from around the world how to deliver financial literacy education. He has also been a gracious host, participant and translator when visitors from other countries have come to Indiana.

Indiana CUs honored for helping Dominica CUs

As part of the keynote presentation during Convention, there was an overview of interaction between Indiana credit unions and credit unions around the world. The presentation was led by League Chairman Dallas Bergl and featured remarks from League Vice Chairman Kevin Ryan and League Director Karen Madry, all of whom traveled aboard in 2019 on behalf of Indiana. During the presentation, Bergl presented Madry with an award he received at a recent World Council Conference, which recognizes Indiana credit unions’ support of Dominica. In September 2018, Madry and representatives from five other Indiana credit unions traveled to Dominica to assist with hurricane relief after Hurricane Maria devastated the Caribbean island nation in 2017.

Five honorees recognized with awards

Five individuals were honored by the League during Convention. The 2019 Professional Achievement Award was presented to Paul Marsh, Teachers CU, and Randy Jones of Energy Plus CU received
Five honorees continued from page 5

the 2019 Leadership Achievement Award. The Emerging Leadership Awards for 2019, which recognize the next generation of credit union leaders, were presented to Andrea Brown of Evansville Teachers FCU, Elizabeth Olson of Harvester Financial CU and Angie Peters of Financial Partners FCU.

CUs receive statewide awards at Convention, and three credit unions win at national level

Statewide awards in CUNA’s national awards competitions were presented Oct. 25 during the League Convention (see full list of winners below). First place winners advanced to the national competition and three of these projects from Indiana will be recognized with national awards during CUNA’s Governmental Affairs Conference in February.

Nationally, Evansville Teachers FCU has been selected for first-place honors for the Dora Maxwell Social Responsibility Award in the more than $1 billion in assets category for its Habitat for Humanity Home Build project. Financial Health FCU will receive a first-place Desjardins award in the less than $50 million in assets category for its New Beginnings Financial Wellness Program and Financial Center First CU will receive a second-place Desjardins award in the $250 million – $1 billion in assets category for its Adult Education Program.

The League has been keeping records of national winners from Indiana since 1988. In those 31 years, there have been 57 projects that have received national recognition.

STATEWIDE AWARD WINNERS

2019 DORA MAXWELL SOCIAL RESPONSIBILITY COMMUNITY SERVICE AWARD WINNERS

<table>
<thead>
<tr>
<th>Asset Size</th>
<th>Place</th>
<th>Winner</th>
<th>Project</th>
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<tr>
<td>&lt;$50</td>
<td>1st</td>
<td>NorthPark Community CU</td>
<td>Lunch &amp; Learn Initiative</td>
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<td>1st</td>
<td>Encompass FCU</td>
<td>Run for a Reason</td>
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<td>1st</td>
<td>Crane CU</td>
<td>Education Essentials</td>
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<tr>
<td>2nd</td>
<td>Via CU</td>
<td>Teacher Grants</td>
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<tr>
<td>HM*</td>
<td>Financial Center First CU</td>
<td>Financial Center’s Greenwood Education</td>
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2019 LOUISE HERRING PHILOSOPHY IN ACTION AWARD WINNERS

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<td>1st</td>
<td>REGIONAL FCU</td>
<td>Steps Program</td>
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<tr>
<td>$250-1 billion</td>
<td>1st</td>
<td>Via CU</td>
<td>Financial Counselors</td>
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<tr>
<td>2nd</td>
<td>Financial Center First CU</td>
<td>Financial Center’s Community Branch</td>
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2019 DESJARDINS YOUTH FINANCIAL LITERACY AWARD WINNERS

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<td>Financial Health FCU</td>
<td>New Beginnings Financial Wellness Program</td>
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<tr>
<td>$250-1 billion</td>
<td>1st</td>
<td>Financial Center First CU</td>
<td>Adult Education Program</td>
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<tr>
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<td>FORUM CU</td>
<td>Financial Education in the Digital World</td>
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2019 DESJARDINS ADULT FINANCIAL LITERACY AWARD WINNERS

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<tr>
<td>&lt;$50</td>
<td>1st</td>
<td>Indiana State University FCU</td>
<td>Money Talk to Project Stepping Stone</td>
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<tr>
<td>$250-1 billion</td>
<td>1st</td>
<td>Financial Center First CU</td>
<td>Student Account</td>
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<tr>
<td>2nd</td>
<td>Via CU</td>
<td>Student Branches</td>
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*Honorable Mention

Crashers are welcomed at Convention

Again, this year, Convention included a group of Crashers. These young professionals, who were selected to attend, are staff members who are not yet at the management team level at their credit unions and who have not been to Convention before. The League works closely with program sponsor CUNA Mutual Group to provide the experience, which includes access to activities on the Convention agenda as well as some Crasher-only gatherings that focus on networking and leadership.

Crashers, from left: Ben Taylor, Financial Center First CU; Brent Koehl, Partners 1st FCU; Jordan Sipe, FORUM CU; Lucas Underwood, Evansville Teachers FCU; Loren Garber, Energy Plus CU; Christopher Norwood, FORUM CU; Jennifer Garber, Partners 1st FCU; Events/League Services Committee Chairman Kevin Ryan, Financial Center First CU; Michala Flaimion, Dubois-Pike FCU; League President John McKenzie, Kayla Wilkerson, INOVA FCU; League Chairman Dallas Bergl, INOVA FCU; Sarah Moore, Crane CU; Katie Hoover, FORUM CU; Foundation Chairman Lori Gonzalez, Members Choice FCU; Danika Pettis, Financial Health FCU; League VP Communications Kay Neidlinger.
CUs on Tap wraps up 2019 with event during Convention Week

October 23 marked the fifth “CUs on Tap” that the League has held in partnership with Corporate One FCU this year. Several Convention attendees took part in the event, which was held in Indianapolis. Previous events were held around the state, with one in Evansville in July, and there were three more across northern Indiana in August. The events raised more than $3,000 for ICUPAC with more than 100 people taking part.

CUs on Tap events focus on advocacy and were designed to foster deeper connections among credit union advocates, leaders and young professionals. Summer sessions also offered professionals development tools that attendees could use immediately, and the opportunity for attendees to learn how to improve their “elevator” speeches so they could clearly communicate on behalf of themselves and their credit unions. For a small contribution to ICUPAC, the League provided a brewery experience at each location.

Corporate One FCU will work with the League to sponsor another series in 2020, due to the success of the 2019 events. Watch for announcements of dates and times for 2020 CUs on Tap events.

Photos from Convention 2019

Current League Directors, from left: Amy Sink, Interra CU; Matt Lambert, Encompass FCU; Cari Palmer, Energy Plus CU; Chairman Kevin Ryan, Financial Center First CU; Treasurer Karen Madry, Afena CU; Board Secretary Dave Abernathy, Via CU; Vice Chairman Kevin Sparks, Crane CU; Members of the Events/League Services Committee, from left: Gary Icenogle, Thrive FCU; Committee Chairman Kevin Ryan, Financial Center First CU; Nan Morrow, Hoosier Hills CU; Kevin Sparks, Crane CU; Andrea Brown, Evansville Teachers FCU; Chris Sipes, Via CU; Kim Kniola, First Trust CU; Matt Lambert, Encompass FCU; Brittani Richards, Thrive FCU; Nina Baker, ProFed FCU; Karen Madry, Afena FCU.

From left: Randy Glassburn, Ball State FCU; Trent Kerr, Indiana State University FCU; George McNichols, Hoosier Hills CU; League President John McKenzie.

Bryan Price, Indiana University CU (L), and Bob Falk, Purdue FCU (R).

Outgoing League Directors Karla Salisbury and Dallas Bergl were recognized with special resolutions at the Annual Meeting.

This group enjoyed the Exhibit Hall.

These igniters presented their projects on Thursday morning. From left: Jason Koontz, Interra CU; Matt Reed, Purdue FCU; Jeanna Richardson, Hoosier United CU; Kerrie Sekal, InOVA FCU; Kenzie Hepler, Interra CU; Brittani Richards, Thrive FCU; Tim Michael, Financial Center First CU; Adam Young, Teachers CU.

League Directors Chuck Donovan, Members Source CU (L) and Matt Lambert, Encompass FCU (R).

Photos continued on page 8
Ryan and Dowden honored with Army Infantry’s Order of Saint Maurice Award

League Chairman/Financial Center First CU President & CEO Kevin Ryan, and Financial Center First CU Board Member Retired Army Colonel, Russell Dowden, Jr., were honored with the U.S. Army Infantry’s Order of Saint Maurice Award.

The Order of Saint Maurice is given by the Chairman of the National Infantry Association and the Chief of the Infantry, U.S. Army in recognition to individuals who have contributed significantly to the Infantry, in particular, demonstrating high standards of integrity and moral character.

Dowden received the Legionnaire level of honor, and Ryan received a Civis level honor for their accomplishment in establishing the Indiana Military Veterans Hall of Fame, a 501(c)3 that recognizes Hoosier veterans for valor during military service or for significant civic contributions post-military career.

Ryan and Dowden’s citation reads, “Appearing before a most judicious and discriminating committee of tried and proven Army Infantrymen and the Infantry Patriots, be it know that Colonel Russell Dowden and Mr. Kevin Ryan were tested and found worthy of special recognition for outstanding contributions to the community of the Army Infantry and are hereby inducted into the Honorable Order of Saint Maurice.”

The citation was signed by Lieutenant General Retired, Thomas Metz, Chairman of National Infantry Association and Brigadier General David M. Hodne, Chief of the Infantry, Fort Benning, Georgia, and was given during the Indiana Military Veteran’s Hall of Fame 2019 Induction Ceremony in November.

Travis Markley named new Hoosier Hills CU CEO

Travis Markley has been selected as the next CEO of Hoosier Hills CU, set to succeed George McNichols who is retiring after 35 years at the helm. Markley’s appointment is effective Jan. 1, 2020. He will be working closely with McNichols until his retirement in March 2020.

Since joining Hoosier Hills in June 2018 as Senior Vice President/Chief Information Officer, Markley has been a key player on the credit union’s executive team. He has spent his professional career leading customer service and customer experience teams in technology and financial service organizations. Markley has a track record of leading organizations through change and innovation, and he is a strong advocate for the credit union movement, especially when it comes to the mission of Hoosier Hills CU.

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Hoosier Hills CEO continued from page 8

Markley holds a bachelor’s degree in Finance from Butler University and a master’s degree in Technology Management from Purdue University. He also has several executive certifications and continuing education in financial systems, leadership, employee development, and process improvement.

“Our board of directors worked with a national search firm to complete the selection process,” said Jennie Edwards, HHCU Board Chair. “After interviewing a number of highly qualified internal and external candidates, we determined Travis to be our best choice for moving the credit union forward. We are pleased to be able to follow George McNichols’ successful leadership with a person of Travis’ experience and talent. We are looking forward to working with him and ensuring a smooth transition in leadership.”

“This is an exciting time for Hoosier Hills Credit Union, and I am honored to be selected as the successor of George McNichols and to serve as the credit union’s next CEO. George and his entire staff have done a remarkable job the past 35 years, and their work has positioned us for tremendous success in the future,” commented Markley on his appointment. “This allows us to continue to serve our members with even greater impact, and to continue fulfilling the mission of improving the financial lives of our members and the communities we serve. Fundamentally HHCU will always remain dedicated to this mission – that isn’t changing.”

Financial Center First CU cuts ribbon on new Kokomo location

Financial Center First CU (Financial Center) celebrated the opening of its new branch in October. The new 3,450-square-foot branch is located at 1935 S. Dixon Road in Kokomo. The grand opening was presented in partnership with the Greater Kokomo Chamber of Commerce as an After-Hours event and included a ribbon cutting ceremony.

League Chairman/Financial Center President/CEO Kevin Ryan said, “We want to thank all the local businesses that helped us construct this beautiful, state-of-the-art facility including Hearn Construction, Davidson Excavating, Tragersser Concrete, and Onmi Electric. We are excited to showcase their work, welcome members from Kokomo Heritage FCU, and serve new members in Howard County.”

The decision to open this new branch came as a result of the merger with Kokomo Heritage FCU, a $10 million credit union formerly associated with Continental Steel.

Known for its focus on financial education, Financial Center’s new branch features a financial library, interactive kiosks where members can access Wealth Builder Online – the credit union’s online financial education platform - plus a 1,000-square-foot Education Center that will host free financial education classes and serve as a free community meeting space for organizations. The Center also has two drive-ups, a drive-up ATM, a coffee café and a coin counter.

Kokomo Heritage’s membership will continue to be served by the Credit Union’s existing staff and its current CEO, Art Lehman. Lehman has assumed Financial Center leadership in the market as Chief Officer, Kokomo. Financial Center also donated Kokomo Heritage’s former branch on Courtland Avenue to the Literacy Coalition of Howard County, Inc.

Notre Dame FCU cuts ribbon on first Arizona office

Notre Dame FCU partnered with the Greater Phoenix Chamber to conduct a formal ribbon cutting ceremony at their recently opened banking office located in Phoenix, AZ. Community members, credit union members, and Partners (employees) gathered to celebrate Notre Dame FCU’s first brick and mortar location in Arizona.

President/CEO Tom Gryp said, “The foundation for this office was laid in partnership with our large and growing Arizona membership base. We are honored to have been serving this market for several years and we will continue to work tirelessly to meet and exceed expectations.”

Notre Dame FCU is a full-service not-for-profit financial cooperative serving members nationwide. Arizona Market President Bob Phillips added, “The local demand for our mission-oriented financial cooperative continues to be high among both consumers and businesses. Our Arizona membership continues to multiply because our products and services are built to meet the needs of our Member-Owners, not stockholders.”

During the open house, Notre Dame FCU Senior Manager of Business Development Mario Elia presented The Society of St. Vincent de Paul with a check for $1,000 to help with their Thanksgiving gift card drive. Elia said, “As a financial cooperative, we believe in reinvesting our profits to support the causes our Member-Owners believe in.”
Three Rivers FCU opens new branch and mortgage center at Stellhorn Crossing

Three Rivers FCU opened its new branch and mortgage center in the Stellhorn Crossing development on the northeast side of Fort Wayne recently. The new, 16,448-sq.-ft. building hosts both a full-service branch and a state-of-the-art mortgage center. The two-story project broke ground last September. The Stellhorn Crossing branch replaces an existing, leased building.

The credit union engaged Bona Vita Architecture, who designed the facility, and Weigand Construction, who served as construction manager.

The building features a branch with an open concept and separate rooms for use by business and investment services. The branch also features a three-lane drive-thru and an in-wall ATM. The accompanying mortgage center will house up to 50 employees and features an open office design with four conference rooms, private video conferencing spaces, and a community room to hold up to 70 guests. The space will be utilized for financial wellness seminars, training, and community meetings and events. The separate mortgage center was needed to support the credit union’s rapidly growing mortgage business. Mortgage services is currently housed in the Corporate Northland Blvd. Campus off of Lima Road, but with growth, the facility has exceeded its intended capacity.

Additionally, the branch showcases all locally created art throughout the building. Stellhorn Crossing marks the eighth credit union branch featuring exclusively local art, and the initiative and partnerships with local artists will continue to expand to other locations.

“We are very excited to share this state-of-the-art facility with our members, future members and the community,” states President/CEO Don Cates. “The Stellhorn Crossing facility will accommodate our growing team and provide a better member experience. Our mortgage team will enjoy a great new work environment with more room to interact with members, realtors, and builders. 3Rivers’ investment of over $32 million in the region since 2012 is unmatched by any other financial institution, and is a result of the credit union’s growth, made possible by our members’ confidence and participation in the cooperative.”

Centra CU to open Nashville branch

Centra CU has announced plans to open a new full-service branch in Nashville, Indiana. The new branch, which will initially employ five new Centra Team Members, will open in early 2020.

“We are very excited for this opportunity to expand Centra’s reach into the community of Nashville. This town is a unique treasure where a local focus thrives, and we look forward to bringing our Member-centered services to the area,” President/CEO Rick Silvers said.

Centra CU will be the first credit union in Nashville, and the team serving the branch will focus on engaging with members to discover and meet all their financial needs. Visitors to the Nashville branch will be able to schedule appointments with mortgage lenders, Business Services representatives and advisors from Centra Financial Services.

Over the last few decades, Centra CU has expanded well beyond its origins in Columbus, Indiana. Nashville will become the credit union’s 25th branch location and the first to have a lobby dedicated to Interactive Teller Machine (ITM) service.

Tech CU celebrates grand opening in Cedar Lake

Tech CU members, staff and local businesses celebrated the opening of the credit union’s newest branch in Cedar Lake. The grand opening event on September 26 commenced with a Chamber of Commerce ribbon-cutting ceremony and ended with a live radio broadcast in the afternoon. Members and guests from the community were treated to lunch, refreshments throughout the day and exciting giveaways. The credit union also provided a donation to the Cedar Lake Project Love Food Pantry.

Centra CU donates $100,000+ to area non-profits

There were 41 grants of $2,500 each awarded to non-profits within the communities served by Centra CU, totaling more than $100,000 in donations throughout Central and Southern Indiana. Team Members were asked to nominate...
Centra CU continued from page 10

the non-profits they feel passionate about supporting, and one non-profit was selected
for each branch and department within the credit union.

“Centra Team Members love being able to support the causes they care about through this program, and we are
proud to be able to support the communities we serve with these donations,” said Centra Community Involvement
Officer Jenni Carr. “We chose to support many local non-profits, along with a few national organizations like the
American Red Cross and American Foundation for Suicide Prevention.”

Some of the local non-profits selected include: Foundation for Youth, Advocates for Children, Champions of Youth Deça-
tur County, Columbus Firemen’s Cheer Fund, Our Hospice of Southern Indiana, Bartholomew County Humane Society,
CRADLE Pregnancy Care Center, Wayside Inn Shelter, Washington County Food Bank and Orphan Grain Train.

“These wonderful organizations support a similar mission and serve the local communities where Centra has a pres-
ence. Credit unions were built on the premise of People Helping People, and we are excited to provide support to
these causes,” Centra President and CEO Rick Silvers said.

Interra CU’s Hometown Giving supports community for 26th year

The 26th annual Interra CU holiday service project, Hometown Giving, is in full swing.
Through a variety of initiatives, the project provides financial support, hosts parties and events, adopts families and donates wish list items to support organizations that serve those in need throughout a five-county area where credit union offices are located. Last
year, nearly $45,000 was distributed, together with hundreds of gifts donated by staff and members.

Corporate support of more than $20,000, combined with staff fundraisers and member involvement, make the project so successful, Karen Steffensen, vice president of communications and community engagement, said. A staff committee met earlier this fall to review and determine which agencies Hometown Giving will support this year. Committee members contacted agencies to learn about wish list needs, plan parties and adopt families.

Angel Trees are up at all 15 Interra offices. Members and employees are encouraged to take angel tags from the trees, shop for items and return them, unwrapped, to Interra by designated due dates, ranging from early December through the end of the year. “While people may not know what the needs are or who to contact at organizations, we’ve done the leg work for them,” Steffensen said. “And, we make the deliveries, too.”

“Merry Match” provides opportunities for people to donate at all Interra offices to the Hometown Giving project. The match is Interra’s corporate commitment.

The primary internal fundraiser is a staff silent auction. Interra and the employees have donated more than 100 items - gift baskets, baked goods, experiences and tickets, hand-crafted items and more. All staff will take part in a week-long online silent auction to raise money for the service project. Other staff fundraisers provide for days off with pay, gift cards and other items. In addition, Interra employees may purchase up to 10 dress-down stickers, with all funds going to Hometown Giving.

The credit union identified 33 organizations to receive support including Bashor Children’s Home, Boys and Girls Clubs, Elkhart County Council on Aging, Salvation Army, St. Joe Valley Blue Star Mothers, various food pantries, schools and other groups.

Beacon CU raises $41,000+ for Riley

Beacon CU had 19 locations located across 12 counties in Indiana complete their year-long fundraising focus for Riley
Children’s Hospital Foundation. Through canvas events, local restaurant tip nights, decorating contests, dancing
events, bake sales and Friday Jeans days Beacon CU employees and members were able to raise over $41,000
for Riley.

President/CEO Kevin Willour states, “We are so blessed to have a facility of this caliber serving the needs of Hoosier children. Beacon Credit Union would like to thank our generous member-owners in helping us support Riley Hospital for Children.”

Riley is the only hospital in the state associated with the Children’s Miracle Network. Credit unions across the country, including dozens in Indiana, support Children’s Miracle Network Hospitals through Credit Unions for Kids.
Beacon CU named Business of the Year in DeKalb County

Beacon CU was recently awarded Business of the Year from the DeKalb Chamber Partnership. The honor was presented during the Duesy Awards ceremony at the Auburn Cord Duesenberg Automobile Museum on November 14. The award was one of eight presented each year to recognize local businesses, leaders and educators for excellence in the business community.

The eight awards recognize those who go above and beyond in the community — “the unique, the innovative, the passionate, the givers, the doers,” the chamber states. There were more than 100 nominations.

Beacon CU provided support to over 25 different DeKalb County nonprofit organizations, and employees volunteered at more than 20 nonprofit events. “We are proud of our employees’ dedication to the community by volunteering their time and effort,” said Chief Operations Officer Dawn Aschleman, “and communities thrive when everyone unites to make a difference.”

Beacon CU’s Project Spotlight donates to 13 communities

Residents from 13 branch communities determined the winners of Beacon CU’s 9th annual Project Spotlight, resulting in $22,750 in donations to charitable organizations in the communities served by the credit union. There were 103 organizations nominated, and more than 68,000 votes cast. Voting by residents of each community determined which charitable organizations received funding. Votes were collected on the credit union’s website, on social media and in Beacon CU’s 19 branches. In each of the credit union’s 13 service areas, a $1,750 donation was split between the top three vote-getters. Recipients included several charities for animals, nursing home and senior care, a school band program, health-related charities, an arts center and much more.

Purdue FCU partners with Purdue Recreation & Wellness for financial program

Purdue FCU (Purdue Federal) along with Purdue Recreation & Wellness bring financial wellness to Boilermakers through a financial wellness program called Boiler Financial Track. Students can take advantage of one-on-one counseling sessions, financial wellness presentations, budgeting help and more.

“Purdue Federal Credit Union recognizes and understands the stress that financial challenges bring to everyday life,” said President and CEO Bob Falk, “and just as Purdue is trying to ease the long-term burdens with tuition freezes, we hope this financial wellness program will equip students with the education they need to be savvy financial consumers.”

The program will help Purdue University students gain lifelong skills—helping them make wise financial decisions as students and beyond. Junia Mccole, Assistant Director, Financial Literacy Education, will serve as the face of the program. She has experience in providing education and guidance to students and their families regarding financial aid, scholarships, financial wellness and more.

Students receive 5,000 backpacks thanks to Indiana Members Foundation

Indiana Members Foundation, the charitable arm of Indiana Members CU, provided 5,000 backpacks to local community organizations to help provide assistance to underserved children in Central Indiana for the 2019 school year. Since 2006, Indiana Members Foundation has donated over 54,000 backpacks and 957,000 school supplies to students in need in the communities served by the credit union.

Mandy Emery, vice president of community involvement for IMCU and executive director of Indiana Members Foundation stated, “We are delighted with the continued support of our employees, members and partners again this year. With their generous donations we were able to purchase 5,000 backpacks filled with school supplies. We donated to 20 organizations and schools that support the youth in the communities served by IMCU. Having the tools necessary to learn at the start of the school has proven to be essential for students to be successful throughout the year.”
IMCU debit card transactions benefit schools

Indiana Members CU (IMCU) recently presented three checks to schools in their service area as part of an ongoing school spirit debit card program. Every time the card is used as a signature-based transaction, the schools benefit. Center Grove Schools received $2,931, Noblesville High School received $2,393 and Lawrence North High School received $946.

Indiana Heartland FCU appreciates first responders

Staff at Indiana Heartland FCU recognized firefighters, police and sheriff’s department personnel for the important role each one plays in Howard County. The credit union provided lunch for the first responders and delivered it to each workplace.

Three Rivers FCU employees spend Columbus Day volunteering

Three Rivers FCU celebrated Columbus Day with a planned day of service. The branches were closed in observance of the holiday, and more than 270 team members spent their day off volunteering in the community at over 27 non-profit organizations in the Fort Wayne area, including: Community Harvest Food Bank, Habitat for Humanity, Fort Wayne Animal Care and Control, Summit Equestrian Center, Black Pine Animal Sanctuary, Fort Wayne Children’s Zoo, Pokagon State Park, Ouabache State Park, DeKalb Humane Society, Wellspring Interfaith Social Services and many more.

This is the fifth year the credit union has observed a federal holiday with a day of service to the community. This is the largest day of service to date, with more volunteers and more community organizations, and is just part of the credit union’s ongoing community engagement commitments.

“Giving back to our community – both in time and financial support – is at the heart of our cooperative,” says President/CEO Don Cates. “On a day when we’d otherwise be closed for business, our team is committed to making an impact in our region, providing over 1,600 collective hours of volunteer work at local organizations. In our culture of giving back, Team3 values the time we get to address the diverse needs of the community and helping others connect with those resources.”

More than 650 from Teachers CU volunteer for 2019 Day of Giving

As part of Teachers CU’s (TCU) Day of Giving on Columbus Day in October, over 650 TCU team members stepped out of the office and service centers to volunteer in communities across Indiana. Team members supported 43 organizations and nonprofits in 16 counties, including food banks, animal shelters, hospitals and educational centers for children with disabilities.

“A point of pride at TCU is the commitment all our team members have to the communities where we live and work,” said President/CEO Paul Marsh. “Our annual Day of Giving is a wonderful way to put our values into action in a way that supports the many great organizations serving our friends and neighbors.”

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Teachers CU continued from page 13
In South Bend, team members worked with organizations including Children’s Dispensary, La Casa de Amnistad and St. Margaret’s House on a variety of activities such as making fleece blankets for children staying at Beacon Children’s Hospital, preparing the grounds and buildings of Camp Millhouse for winter and sorting donated books at Goodwill Industries to create Lending Libraries for teachers. The annual Day of Giving is an extension of TCU’s ongoing effort to support the communities it serves. In 2018, TCU team members collectively recorded over 14,000 service hours. Together TCU and the TCU Foundation also gave back more than $750,000 to local organizations.

Advance Financial FCU and its board of directors assist local charities
While Advance Financial FCU (AFFCU) is committed to the philosophy of “People Helping People” on a year-round basis, this belief is heightened during the holiday season. In Northwest Indiana, nearly 100,000 individuals are food insecure, meaning they don’t have sufficient food for themselves and their families. Many children in this area don’t receive the kind of gifts that most children are accustomed to receiving...or even worse, they don’t receive any gifts.

Again this year, AFFCU is supporting the Food Bank of Northwest Indiana and the Salvation Army’s Angel Tree program. In addition to the annual fundraisers conducted by the credit union for these two charitable organizations, the Board of Directors of the credit union has generously committed additional funds.

“We believe strongly in the missions of these two organizations and decided to up the ante this year,” said Janice A. Vamos, Chairperson of AFFCU. “When the suggestion was made for the board to add financial support to these two organizations, we all rallied behind the motion,” commented Vice Chairman Yale Gordon.

In addition to donating 326 food items, AFFCU raised $1,154 in total this year for the Food Bank of NWI which translates into nearly 3,500 meals. The credit union also helped to grant the wishes of nearly 40 Angels in need of a Christmas gift in the Angel Tree program.

Advance Financial FCU Opens Eyes during staff training day
The theme of the recent staff training day at Advance Financial FCU was “Open Your Eyes.” A participant in the awareness campaign by the same name, the credit union carried the theme throughout the event from the decorations to the presentation, and also showed the staff some of the Open Your Eyes commercials in between sessions. “We are truly thrilled to be a part of this special campaign and will continue to promote it to our members and communities,” said President CEO Jerry Gomez.

Crane CU presents Fifth Annual Lenora Whitehead Service Award to honor extraordinary staff
Crane CU recently awarded the fifth annual Lenora Whitehead Service Award to Laurie Wagner, Member Service Representative II at the Linton branch.

Lenora Whitehead worked as a part-time teller at the Washington branch from 2002 until she retired in 2014. Unfortunately, soon after retirement, Mrs. Whitehead passed away. Those who knew and worked with her are well aware of the extraordinary member service she provided on a daily basis. Mrs. Whitehead always displayed a great attitude. She could be described as selfless and dependable and was a woman of character and integrity. The Lenora Whitehead Service Award is awarded each year to an employee who demonstrates all of these same qualities.

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Crane CU Lenora Whitehead Award continued from page 14
The winner of the award is also able to select a charity or organization of their choice for a $1,000 donation. Laurie has chosen Night to Shine, an event created by the Tim Tebow Foundation. Laurie attends Linton First Christian Church and they will be hosting a Night to Shine celebration. Laurie is very active in her church volunteering with activities such as the community Thanksgiving dinner, working with the Linton Food Pantry, teaching vacation bible school, and portraying Mary in her church’s Winter Walk live nativity scene.

Dubois-Pike FCU provides $1,200 in scholarships
To help support local teachers and in turn local students, Dubois-Pike Federal Credit Union awarded six (6) $200 classroom scholarships for a total of $1,200 for area teachers this year.

At the start of the school year, Rose Nealy and Lisa Meyer of Dubois-Pike FCU surprised each of the six teachers by going to their classrooms to present the awards.

Dubois-Pike FCU had 127 applications submitted and narrowed it down to six winners, one teacher from each school corporation in Dubois and Pike Counties. With such positive feedback, the credit union plans to make this an annual scholarship to give back to local teachers, students, and community.

Financial Center First CU scholarship presented to Romero
Financial Center First CU (Financial Center) awarded Lorena Couttolenc Romero with the first Pamela Gemmer Memorial Scholarship in December. Romero was selected for the inaugural scholarship for her commitment to arts and education through her ties with Ballet Folklorico Mosaicos, an organization dedicated to teaching, preserving, and sharing the heritage of Mexican folkloric dance.

The scholarship fund was created in memory of Pamela Gemmer, who served on Financial Center’s International Advisory Council and carries on her legacy of arts, education and cultural understanding.

Financial Center supports food pantry
Financial Center First CU has donated $3,500 to the St. Vincent de Paul Food Pantry. The organization works to end poverty through providing food and thrift services to individuals in need. The money donated was a portion of the funds raised from Financial Center’s 21st annual charity golf outing.

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New board member at Hoosier Hills CU

Sally Gogel Fischer, owner of Gogel Fischer & Associates CPA in Jasper, has been appointed to fill an open seat on the Hoosier Hills CU (HHCU) board of directors. Her term begins Jan. 1, 2020, and her initial term will be for one year. She replaces Bill Miller, who retired from the Board after 50 years of service.

An HHCU member for more than 10 years Fischer brings a wealth of professional and community volunteer experience, plus extensive leadership and management tenures to the Board. She has logged more than 17 years of corporate accounting work and more than 12 years of private-practice accounting for public clients.

“I work with clients to analyze their financial positions and strategies, plan for expansions, optimize taxes and much more,” Fischer said. “In past positions in corporate accounting, I worked in business roles such as chief financial officer, overseeing all the financial aspects of the business. In those capacities, communication and interactions with other departments and management are essential. I believe that enables me to look at things from lots of perspectives.”

Shriver and Long are promoted at Beacon CU

Julie Shriver has been named Branch Manager of Beacon CU’s Logansport East location. In her new role, she will monitor and develop branch growth, promote member use of credit union products and services and engage with the Logansport community. She will also be responsible for developing and leading staff to ensure professional, courteous, and prompt service to the credit union’s member-owners. Shriver has over 23 years of financial banking experience and prior to her promotion, served as a Member Service Representative at Beacon’s Rochester South location.

Molly Long has been named as Mortgage Loan Originator. In her new role, Long will be a valuable resource for members looking for a mortgage or to refinance their current home through financial counseling and product/service awareness. Long has over nine years of member service experience at Beacon Credit Union in various roles: Teller, Consumer Loan Officer, and Branch Manager.

Financial Center First FCU names Norton Director of Application Development

Financial Center First CU (Financial Center) has named James Norton as the new Director of Application Development. Norton has been an employee of Financial Center since 2018, serving as Senior Application Developer and contributing to the development of Financial Center’s new online and mobile banking platform. Norton carries over a decade of experience in the finance industry, having worked with Citibank North America for over 12 years and most previously served as a Programmer Analyst/SQL Developer for Vantage Credit Union, where he designed, built, and maintained systems to support online and mobile banking applications.

Boilek joins Notre Dame FCU in Lake County

Notre Dame FCU has named Brian Boilek as the new Senior Commercial Loan Officer in Lake County.

A Lake County native, Boilek is excited to share his expertise under the mission-oriented Notre Dame FCU umbrella. He has over twenty-five years of experience building and managing commercial banking portfolios. In his most recent senior role, Boilek built and managed a commercial banking team.

President and CEO, Tom Gryp, said, “Notre Dame FCU has spent many years building a suite of disruptive business products to bring real value to our business members. As we introduce these innovative solutions to Lake County, I cannot think of a better person to represent our organization than Brian Boilek. As a seasoned local commercial expert, he has the unique skills to add immediate value to Lake County businesses. I am very pleased that Brian is part of the Notre Dame FCU family.”
Shuffett is new at Centra CU

Centra CU has welcomed Business Services Credit Analyst Hayden Shuffett. He brings over six years of experience in the retail banking industry as a lender and manager in the Columbus market. His previous roles include financial center manager and client service manager for area banks.

“We are very excited to have Hayden join the Centra family.” Karl Kissinger, Centra CU’s SVP Business Services said. “His local banking experience and his community volunteerism and leadership will prove to be a great addition to the Business Services Team.”

Jurczak is new loan officer at IMCU

Indiana Members CU (IMCU) has announced that Adam Jurczak has joined the organization as a loan officer and will work in the mortgage department. In his role as a loan officer, Adam will guide members through the home buying process. He is familiar with many different loan options available for both first-time home buyers and current homeowners.

Heritage FCU names Collins to new position

Heritage FCU announced that Joseph Collins has been selected to fill the position of Indirect Lending Business Development Officer.

Collins will develop and maintain relationships with local indirect partners. He has been an employee of the credit union for the past six years, most recently serving as a Jr. Consumer Lending Underwriter and, before that, serving as a Financial Services Consultant. He also has served in the Indiana National Guard.

David K. Milligan, CIA, CUERME, President and CEO said, “Heritage FCU is excited to welcome Joey as the new Indirect Lending Business Development Officer. I am confident that Joey, with his professionalism, outstanding work ethic, and dedication to the credit union, will be a valuable addition in his new role for HFCU and the 62,000+ members we serve.”

Purdue FCU has a coin sorter for sale

Purdue FCU has a working coin machine for sale. It was originally manufactured and purchased in 2017 for use at the credit union’s main office, where there was high coin counting volume. The machine model is a Glory QuickChange Coin Sorter with bins. It uses two large bins, instead of individual plastic coin bags (See photos at right for reference.)

The credit union is asking $15,000 for the coin machine. It must be picked up from the Purdue FCU main office at 1551 Win Hentschel Blvd., West Lafayette. For more information or if you are interested in purchasing, please directly contact Lauren Goodrich at (765) 497-8838 or lgoodrich@purduefed.com.

Register now to attend the 2020 Legislative Affairs Forum and State Legislator Reception

Plans are underway for a Legislative Affairs Forum you won’t want to miss! The event will be held on Monday, Jan. 27 at the Hilton Indianapolis Hotel. Heading into the critical 2020 elections, the featured speakers will be nationally recognized political commentators Sarah Stewart Holland and Beth Silvers, who host the Pantsuit Politics podcast and wrote the book I Think You’re Wrong (But I’m Listening), focusing on restoring civility to political conversations. You’ll also get the latest news on what is happening at the Statehouse and hear about political and regulatory developments impacting credit unions in 2020.

In the evening following the daytime Forum, the annual reception for state legislators gives credit union leaders the chance to personally interact with their state representatives and senators. We strongly encourage you to register for the State Legislator Reception and stay to talk to your legislators about all that your credit union is doing for its members and community. To register, visit http://www.cvent.com/d/wyqblx.
A Partnership Rooted in Our Collective Purpose

By Gerry Singleton, CUNA Mutual Group

The collective power of our collaboration as credit union system partners helps us remain competitive in a rapidly changing financial services marketplace.

CUNA Mutual Group was established nearly 85 years ago as part of the credit union movement, founded principle of people helping people. A lot has changed since our founding in 1935, but we’ve stayed true to our roots and our fundamental belief that a brighter financial future should be accessible to everyone.

The people we serve in partnership with credit unions work hard for what they have and want to protect their livelihood and loved ones. We work every day to deliver innovative, reliable solutions and experiences that enable more people in more ways to make financial decisions that work for them.

Customer expectations are changing fast and we’re changing with those expectations. We clearly aren’t the same company we were a few years ago. We’re going through our own transformation to remain relevant to the credit unions and consumers we serve today. We’re looking to the future and embracing innovation and disruption. Technology will continue to transform how consumers interact with businesses and we’re making high-levels of investment in technology and the customer experience.

Today, we protect nearly 30 million consumers and have relationships with 95% of credit unions in the U.S. Helping credit unions remain strong is a big priority for us. That’s why we support organizations that contribute to the growth and vitality of credit unions; providing more than $155 million to the movement over the last 5 years.

United on Advocacy

Our commitment to credit unions extends well beyond our products and services. When the advocacy battles heat up, we are there to stand united with credit unions.

Most recently, we focused our resources and advocacy efforts to preserve the credit union tax exemption in Iowa, Kentucky, Kansas and Illinois. That battle isn’t over yet and we’ll continue to stand united with credit unions on these critically important issues.

Giving Back Part of our Core

Like credit unions, giving back to the community is part of who we are. Last year, our employees donated their time, money and expertise, logging more than 15,000 volunteer hours. We also contributed an additional $20 million to our foundation to create a sustainable funding source for many years to come. We want to make a real difference and help close the gap on economic and educational disparities in our communities.

Fostering a Diverse, Equitable and Inclusive Culture

We believe greatness can come from anywhere and anyone and we’re building an environment where everyone feels included. Our 12 employee resource groups are driving greater awareness around how our unique and diverse backgrounds build a stronger and more innovative organization.

We’re excited about the future. We believe CUNA Mutual Group will continue to be the partner credit unions count on to help them grow in new ways and to build deeper member relationships. We’ll be there to make a difference in the lives of your members, in partnership with credit unions. We are here to help credit unions and the system succeed.

Gerry Singleton is the Vice President, Credit Union System Relations for CUNA Mutual Group, the leading provider of insurance and financial services to credit unions and their members. Contact him at gerry.singleton@cunamutual.com.