



ALM | Credit Union Times  
**LUMINARIES 2022**

# Awards Program

Nov. 9, 2022

Four Seasons Hotel Washington, D.C.

#cutimesluminaries

ALM.



**Congratulations  
Brian Best**

President and Chief Executive Officer

**2022 Credit Union Times  
LUMINARIES  
Finalist**

# Welcome



## Welcome to CU Times LUMINARIES Awards Ceremony

We are thrilled to recognize the inaugural group of individuals, credit unions and credit union-supporting organizations selected as LUMINARIES. This groundbreaking recognition program shines a spotlight on the many dynamic and inclusive ways these leaders and organizations are driving the credit union industry forward.

This first-ever group of LUMINARIES is not a collection of credit unions or organizations with the biggest level of assets or known for being caught up in the industry's latest buzz. Rather, members of the Class of 2022 LUMINARIES are producing meaningful and sustainable results in the areas that matter most to credit unions: Diversity, Equity & Inclusion, Innovation in Technology, Product Innovation, Executive Leadership and the industry's Rising Stars.

I wanted to briefly explain how we arrived at tonight's event. The submissions we received underwent a rigorous process after respondents completed the online entry form. All entrants were tasked to ensure their submissions complied with the criteria created for each category. Every submission we received was vetted by our Executive Editor, Natasha Chilingirian and myself to ensure all criteria were met before a shortlist of entries were handed over to our expert judging panel. The judges took it from there and tonight we will reveal the winners.

The LUMINARIES stand out for their outstanding abilities to deliver change, meeting the needs of members and introducing innovation to the credit union industry. During tonight's program and throughout our year-round coverage, you'll learn more about these influential professionals and organizations, as well as the stories behind their remarkable contributions.

On behalf of the entire Credit Union Times team, I would like to thank all of this year's winners and the many credit union professionals and organizations that submitted nominations. I would also like to thank tonight's participants, sponsors and other members of the credit union community for supporting our pioneering recognition program.



**Michael Ogden**  
Editor in Chief  
Credit Union Times





# *Congratulations*

## Credit Union Times LUMINARIES finalists



**Chuck Fagan**  
President & CEO  
PSCU



**Lynn Heckler**  
EVP, Chief Talent Officer  
PSCU

PSCU congratulates **Chuck Fagan, Lynn Heckler** and all of the finalists for the inaugural Credit Union Times LUMINARIES Awards. We applaud this prestigious group and their outstanding contributions to the credit union movement.

As the nation's premier payments CUSO and a proud part of the credit union industry for more than 45 years, PSCU provides state-of-the-art technology and state-of-the-heart service to help credit unions grow and meet the evolving needs of their members. Learn more at [pscuhq.com](https://pscuhq.com).



# Thank you to our sponsors



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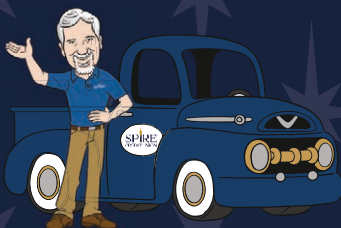


# *Congratulations*

## **DAN STOLTZ**

*SPIRE Credit Union President & CEO*

Class of 2022 Luminaries finalist, Executive Leadership - East Division



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## DIVERSITY, EQUITY & INCLUSION - INDIVIDUAL



**Anjoli Walker**  
BCU Credit Union



**Samira Salem**  
Credit Union National Association (CUNA)



**Rhotunda Conda**  
Golden 1 Credit Union



**Maurice Smith**  
Local Government Federal Credit Union



**Lynn Heckler**  
PSCU



**Colleen Nerius**  
SAFE Credit Union



**Richard Romero**  
Seattle Credit Union



# CUTTING CREDIT UNION COSTS SINCE 1992



## WHO WE ARE

We started by simply offering Shared Branching in 1992, but over the past few years we have changed tremendously as an organization. The Aux Team understands credit union pain points because we have lived them ourselves, many of us as decades-long credit union veterans. We are real people, dedicated to a cause, working together to make your credit union stronger.

The people who help the people who help the people: this is the essence of our company.

## WHAT WE DO

As a CUSO, our focus now lies in innovative back-office services that benefit credit unions and strengthen the industry for future generations.



### FULL SERVICE ACCOUNTING/CFO

Full credit union accounting, bookkeeping, and CFO consulting services. Our experienced team can cover all your accounting needs, from daily duties to call report and budget preparation, and everything in between.

CFO Consulting Services are offered fractionally - meaning you choose how many hours you need a CFO for each month. Take the burden off your executive team without the exorbitant costs of hiring, training, and benefits.



### FULL SERVICE COMPLIANCE

Experienced compliance services that are uniquely hands-on and robust. We cover the standard credit union needs: BSA, Fair Lending, SAFE, ACH, and so on, but also provide much deeper support for those who need it.



### CUERY: CU DATA ANALYTICS

Cuery, ask more of your data—an affordable data analytics solution that provides a comprehensive member view. Use AI to predict what your member needs next.

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## DIVERSITY, EQUITY & INCLUSION – ORGANIZATION

Coastal Credit Union

Community Credit Union

Ent Credit Union

Jovia Financial Credit Union

Members 1st Federal Credit Union

Spectra Credit Union

Travis Credit Union

## EXECUTIVE LEADERSHIP – INDIVIDUAL EAST



**Brian Best**  
GTE Financial



**Kyle Markland**  
Municipal Credit Union



**Dan McGowan**  
Pioneer Appalachia Federal Credit Union



**Dan Stoltz**  
SPIRE Credit Union



**Jan N. Roche**  
State Department Federal Credit Union



**Bob McKay**  
Together Credit Union

*Green* State is proud  
to recognize

# **Kenia Calderon Ceron**

as a 2022 Luminaries  
Award recipient.



**GreenState**  
CREDIT UNION



**Kenia Calderon Ceron**

Bilingual Business Development Director

*Thanks for making a difference  
for our members, Kenya!*



## EXECUTIVE LEADERSHIP – INDIVIDUAL WEST



**Emily Hollis**  
ALM First



**Kendall Garrison**  
Amplify Credit Union



**Doug Burke**  
Aux, LLC



**Mollie Bell**  
Ent Credit Union



**Greg Mitchell**  
First Tech Federal Credit Union



**Howard N. Baker**  
Greater Texas|Aggieland Credit Union



**Matt Rarden**  
Kirtland Federal Credit Union



**Sterling S. Nielsen**  
Mountain America Credit Union



**Kelley Ferguson**  
Numerica Credit Union



**Andrea Brewer**  
PremierOne Credit Union



**David Frazier**  
Texans Credit Union



**David Tuyó**  
University Credit Union



Congratulations to the Jovia  
**Committee for Diversity,  
Equity, & Inclusion** (DE&I).

On behalf of the Jovia Financial  
Credit Union team, we are proud  
of the committee's ongoing  
commitment to build a  
more diverse and  
inclusive workplace.

Congratulations to all the  
Credit Union Times  
Luminaries 2022 Nominees.



“The beauty of the world lies  
in the diversity of its people...”



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Credit Union

Bank on the bright side.

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## EXECUTIVE LEADERSHIP – ORGANIZATION

**Chartway Credit Union**

**Community Credit Union**

**Credit Union National Association**

**Credit Union of Texas**

**Municipal Credit Union**

**New Orleans Firemen's Federal Credit Union**

**Texans Credit Union**

## INNOVATION IN TECHNOLOGY – INDIVIDUAL



**Michael Tindall**  
Area Financial Services



**Ben Teske**  
Greater Texas|Aggieland Credit Union



**Amber Kaeter**  
Magnifi Financial CU



**April M. Clobes**  
MSU Federal Credit Union



**Joe Welu**  
Total Expert

*KeyPoint is a full-service, not-for-profit credit union dedicated to providing financial solutions to help Members save money and achieve their goals in life.*

A photograph of four people (two men and two women) smiling and looking down at something they are holding together, set against a background of palm trees and a clear sky.

## KEYPOINT COMMERCIAL BANKING

Despite higher interest rates, KeyPoint has already originated a record \$104.9 million dollars in Commercial Real Estate and Small Business Administration loans in 2022. In 2021, we originated \$99.5 million in loans. **And we have taken no loan losses in 2021 or 2022.**

With such volume, we can share the wealth with the Credit Union community. KeyPoint has loans to participate out. **So far in 2022 we have accepted participations of \$72.1 million. In 2021, we participated out \$53.0 million.**

### COME PARTNER WITH US!

To learn more about KeyPoint and opportunities to participate in our attractive commercial loan portfolio, please contact **Lance Nelson** at [lnelson@kpcu.com](mailto:lnelson@kpcu.com)





## INNOVATION IN TECHNOLOGY – ORGANIZATION

4Front Credit Union

Commonwealth Credit Union

Enrich

Ent Credit Union

MAX Credit Union

NorthPark Community Credit Union

OpenLending

THRIVE Strategic Services

## PRODUCT INNOVATION – INDIVIDUAL



**Kristi Kenworthy**  
Dora Financial LLC



**Ryan Coleman**  
Equifax



**Chuck Fagan**  
PSCU



**Joe Welu**  
Total Expert



Congratulates the nominees for this year's CREDIT UNION TIMES LUMINARIES AWARDS, including our very own CEO, Kyle Markland, and Leadership Team.

We are honored to be part of the credit union movement for over 100 years, and look forward to *connecting our members and communities with an exceptional financial future.*



*Serving the heroes who serve the Greatest City in the World*

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## PRODUCT INNOVATION – ORGANIZATION

Alliant Credit Union

Amplify Credit Union

Commonwealth Credit Union

Community Credit Union

Dora Financial

eGain Corporation

Experian

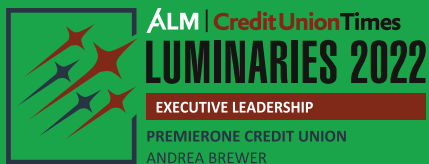
KeyPoint Credit Union

Patelco Credit Union

Workers Credit Union



We're here  
for our  
members  
and she's  
here for us.



**CONGRATULATIONS TO OUR CEO, ANDREA BREWER, EXECUTIVE LEADERSHIP AWARD NOMINEE.**

At PremierOne, our #1 goal is to be there for our members. But we couldn't do our jobs if our CEO wasn't there for us. Thank you, Andrea, for your visionary leadership and inspiring us to be the best at delivering our members a better financial life.

STAY CONNECTED



[premieronecu.org](http://premieronecu.org)

Together, we're just better.



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# Shortlist



## RISING STAR



**Jeramey Litzman**  
Associated Credit Union of Texas



**Laraine Dickerson**  
CUNA Brokerage Services, Inc.



**Alison Heller**  
Equifax



**Kenia Calderon Ceron**  
GreenState Credit Union



**Alex Welle**  
Magnifi Financial CU



**Emilie Lewis**  
Palmetto Citizens Federal Credit Union



**Chase Larson**  
St. Cloud Financial Credit Union



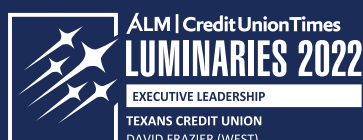
**Haley Rebel**  
Styskal, Wiese & Melchione, LLP

# EVERYTHING IS BETTER IN TEXAS!



Back Row L to R: David Frazier (Chief Executive Officer; Jenni Short (Chief People Officer);  
Mike McWethy (Chief Experience Officer); Matt Moore (Sr. Vice President – Retail)  
Front Row L to R: Tracy Montez (Sr. Vice President – Controller); Ben Hart (Chief Financial Officer)

***Congratulations to Texans Credit Union on  
being a finalist for the Luminaries award!***



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