



CHAPTER REPORT

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COMMUNICATE

The latest news and announcement for chapter leaders.

Register Today for IMPACT 2025: Cornerstone Annual Meeting

The time is nearly here! IMPACT 2025 is Cornerstone's must-attend annual meeting for credit union professionals, happening May 13–16 in Round Rock, Texas.

Why It Matters:

This event brings together credit union leaders, board members, and professionals from all disciplines to network, learn, and collaborate on shaping the future of our movement.

What to Expect:

- Expert insights and new speakers: Gain actionable strategies from keynote speakers like Erik Qualman, digital leadership expert, and Traci Brown, a deception detection specialist.
- Educational tracks: Sessions tailored for CEOs, board members, and specialists in culture, innovation, and strategic growth.
- Exclusive experiences:

- Networking at the golf tournament.
- Exploring solutions in the Expo Hall.
- Celebrating industry excellence at the Awards Luncheon.
- Supporting credit union initiatives at the Foundation Fundraiser.

The Bottom Line:

IMPACT 2025 is your chance to connect, innovate, and grow in one of the year's premier credit union events.

Register now to participate. Explore full event details online: **Learn More.**

Qualifying credit unions with assets \$12 million and under may send one person free of charge to IMPACT. Email Jovani Triche for more information

Small Credit Union Workshops Return for 2025

The first **Small Credit Union Workshop** of the year is around the corner. Join us on May 13 in Round Rock, Texas, during IMPACT 2025: Cornerstone Annual Meeting for a special agenda.

Registration is available for all four workshops. Plan ahead and register today.

Upcoming Webinar: My First Nest Egg

We're thrilled to invite you to register for the **My First Nest Egg Informational Webinar** on May 7. My First Nest Egg is all about empowering youth with fun and engaging financial education programs. Discover a fun and engaging way for your younger members to learn about financial wellness, register today.

Join the YP Community

Young Professionals: Join the YP community to connect with your peers, share ideas, and receive YP news.

Stay in Touch with Cornerstone League

As you conduct your planning sessions, create your calendars of events, or update your boards, please email your chapter liaison to keep Cornerstone in the loop. Cornerstone League also provides [chapter officer resources](#) on the Cornerstone website.

Please contact ChapterRelations@cornerstoneleague.coop if:

- You encounter challenges that could benefit from League guidance or want to discuss training or meeting options.
- You want to share news about [upcoming meetings and events](#) with the chapter community. Include photos with captions.

ADVOCATE

Opportunities for grassroots advocacy and government relations.

Support CU House of Oklahoma: Night for the House

Night for the House is an chance to gather with friends, enjoy some networking opportunities, and support credit unions so they can continue to make a positive impact within their communities.

[Register today](#) to attend this delightful wine tasting event benefitting the Credit Union House of Oklahoma.

EDUCATE

Opportunities for professional growth and development.

Save \$200 on Principles & Philosophy Workshop Registration

One thing remains constant in financial services: the principles and philosophies that guide credit unions. They're not just ideals—they're the bedrock of good business. Understanding their application isn't just insightful; it's essential for setting your credit union apart in an ever-changing marketplace.

Join us for the Principles and Philosophies Workshop, July 29-31, in St. Louis, Mo. Save money with the early bird discount! Register by May 25 to save \$200.

Why you should attend this unique workshop:

1. **Strategic Insights:** Gain invaluable insights into how these foundational concepts can be applied to your credit union's operations. Discover practical strategies to better serve your members while reinforcing the unique value proposition of financial cooperatives.
2. **Competitive Edge:** Learn how embracing these principles can be a primary differentiator for your credit union in a competitive market. You'll solidify your position as a trusted financial partner by aligning your organization with the values that resonate most with consumers.
3. **Member-Centric Approach:** Explore how integrating these principles into your business model can enhance member satisfaction and loyalty. By prioritizing the needs and well-being of your members, you'll cultivate stronger relationships and drive long-term success.
4. **Market Positioning:** Understand the role of principles and philosophies in shaping the perception of credit unions within the broader financial ecosystem. Position your credit union as a beacon of ethical leadership and community-centric values, attracting like-minded members and stakeholders.
5. **Inspiration and Collaboration:** Engage with industry peers and thought leaders who share your commitment to the credit union movement. Exchange ideas, share best practices, collaborate on innovative solutions to common challenges, and reignite your passion for driving positive change.

Don't miss this opportunity to unlock the full potential of your credit union by harnessing the power of the movement's principles and philosophies.

[Register now to secure your seat!](#)

Last Chance to Apply for SCMS Scholarship

Thanks to the generous contributions of SCMS alumni and students, Cornerstone Foundation, TruStage, and others, scholarships are available for first, second, and third-year students enrolled in Southwest Credit Union Management School can apply

for the SCMS Scholarship before the opportunity is gone.

Applications are due April 30, [apply now](#).

FiCEP Registration Ends May 16

Financial stress is one of the biggest challenges facing credit union members today. The Financial Counseling Certification Program (FiCEP) equips credit union employees with the knowledge and confidence to guide members through financial hardships, opportunities, and everything in between.

By becoming Certified Credit Union Financial Counselors (CCUFCs), employees don't just enhance their own expertise; they become a lifeline for members in need, reinforcing the credit union difference.

Case in Point: Meritrust Credit Union is leading the way, committing to FiCEP certification for 50% of its staff by 2026. The goal? To embed financial wellness expertise across the organization and amplify its impact in the community.

"After certification, not only are employees more knowledgeable themselves, but they're also able to help people within their areas of influence, like friends and family, in addition to serving our members more effectively." – Chris Wolgamott, CCUFC, CUDE, Meritrust Director of Financial Well-Being

Why It Matters:

- Empowers employees to confidently support members in financial distress
- Positions credit unions as trusted financial wellness partners
- Strengthens the 'People Helping People' mission with tangible action

Get Involved: Registration for FiCEP Cohort 2 is open until May 16. Whether you want to certify your team or take the course yourself, now is the time to invest in financial education.

Learn More and Register: [FiCEP Training Program](#)

Expand Your Skills This Summer with Cornerstone Learning Opportunities

At Cornerstone League, we believe investing in professional development strengthens not only individuals, but the entire credit union movement. Whether you're looking to expand your lending knowledge, learn ALM concepts, stay ahead of compliance trends, or access specialized training for smaller institutions, there's something for everyone this summer.

Upcoming Virtual Events

- **Branch Manager Bootcamp: Summer Session 1 | May 21 | Virtual**
Join us for an energizing session designed to sharpen leadership skills, strengthen member service, and empower your branch to thrive. [Register today.](#)
- **Consumer Lending Bootcamp: Session 1 | June 12 | Virtual**
Boost your lending expertise with practical insights into effective consumer lending strategies and member service excellence. [Register today.](#)

Upcoming In-Person Events

- **ALM Workshop | June 17–18 | Houston, Texas**
New to asset/liability management or looking to deepen your expertise? The ALM Workshop will cover critical concepts, tools, and best practices for managing your credit union's balance sheet.
- **Small Credit Union Forum | June 23–24 | Allen, Texas**
Designed especially for smaller institutions, the Small Credit Union Forum offers tailored insights, peer networking, and training to address your unique challenges—and opportunities.
- **Compliance and Audit Forum | July 10–11 | Kansas City, MO**
Stay sharp on regulatory trends and risk management strategies at the Compliance and Audit Forum, designed to equip financial professionals with the latest insights and tools.

We encourage you to periodically check our [website](#) to stay updated on our upcoming events.

CELEBRATE

Share your stories so we can celebrate your good works.

Central Texas Chapter Hosts CEO Leadership Training and Supports Local Youth

The Central Texas Chapter of Credit Unions came together in April for a Chapter Meeting and leadership training session, continuing their mission to foster growth, connection, and community impact. The training session was made possible thanks to grant support provided by the Cornerstone Foundation.

The meeting featured a dynamic panel of CEOs who generously shared their leadership journeys and professional insights:

- Gerardo Paz, South Texas Federal Credit Union
- Melanie Kennedy, Southwest Financial Federal Credit Union
- Mary Beth Spuck, Resource One Credit Union

During the in-depth leadership training session, these credit union leaders opened up about the challenges they've faced, the strategies that helped them grow resilient teams, and the leadership philosophies that guide their success. Attendees walked away with practical takeaways to empower their personal and professional development.

In the spirit of People Helping People, the Chapter's April service project benefited The Cove, a Waco-based nonprofit providing a safe space for homeless youth. Thanks to attendee donations, the chapter continues to make a meaningful difference in the local community.





Share Your Stories

We want to shine a spotlight on the good works your chapter is doing in your communities. Send your stories to ChapterRelations@cornerstoneleague.coop.



DONATE

Ways to donate your time, energy, or money to help others.

Save the Dates

- Register for CU Swing by Sept. 12! The **28th annual Foundation Golf Tournament** will occur May 13 at the Teravista Golf Club in conjunction with IMPACT 2025: Cornerstone Annual Meeting. Don't miss out on the fun and the opportunity to play for the benefit of credit unions. [Register today.](#)
 - **Last chance to register for Foundation BASH!** Every year, we celebrate the impact of your Cornerstone Foundation at [IMPACT: Cornerstone Annual Meeting](#). The party includes drinks, dinner, and entertainment. [Register today.](#)
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Support your Foundation in 2025

On behalf of the Cornerstone Foundation staff and trustees, thank you for your ongoing support. For 2025, please keep your Cornerstone Foundation in mind. It's as simple as supporting ongoing events and giving personally to the Foundation via payroll deduction or a direct contribution.



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