

VISION



THE PREMIER RESOURCE
FOR BUILDING A BETTER
FINANCIAL FUTURE

WE RAISED
\$1,049,847
BECAUSE YOU
SUPPORTED...

- Disaster Relief
- Payroll Deduction
- Annual Raffle
- Credit Union/Chapter Fundraising Events
- Community Investment Fund
- Individual Giving
- Memorials/Honorariums
- 22nd Annual Golf Tournament
- Festival of Trees

The Foundation would not be able to carry out its mission, vision, and initiatives without your generous contributions – one donation at a time.

2019

IMPACT Report



MISSION

EMPOWERING PEOPLE
TO IMPROVE THEIR
FINANCIAL WELL BEING

MANAGEMENT TEAM



CAROLINE WILLARD, CUDE
CEO/President
Cornerstone Credit Union
League/Foundation



EMILY MORENO, CUDE, CCUFC
Grants Manager



COURTNEY MORAN, I-CUDE, CCUFC
Executive Director



ANGIE LUTES
Administrative Coordinator



STACI ZALE, CUDE, CCUFC
Development Director



KAREN HART, CAE, CUDE
EVP, CAO, CFO
Cornerstone Credit Union League



MARINA GARCIA, CCUFC
Financial Capability Director

CURRENT BOARD OF TRUSTEES

OFFICERS

Chair, **Art Hornell**, SCMS, CEO, The People's FCU
Vice-Chair, **Donna Neal**, CEO, My Community CU
Treasurer, **Dave Willis**, EVP/COO, Tinker FCU
Secretary, **Shelli McCoy**, CUDE, VP, Tarrant County's CU

STANDING TRUSTEES

James Boyd, SCMS, CEO, Abilene Teachers FCU
League Vice-Chair
Tammy Passafiume, President, Diamond Lakes FCU,
League Secretary

TRUSTEES

Kanika Boutté, CUDE, COO, Energy Capital CU
Pam Garrett, VP, Diamond Lakes FCU
Debbie Gatlin, SCMS, CEO, Pine FCU
Stephen Lark, VP, Communication FCU
Crystal Long, CUDE, CEO, GECU
Andy Reed, CUDE, SCMS, CEO
Baylor Health Care System CU
Craig Rohden, CEO, Space City CU
Mary Beth Spuck, I-CUDE, CEO, Resource One CU
Russell Vest, CEO, Hockley County Employees CU
Becky Whitted, CEO, Northwest Arkansas FCU

ADVISORY TRUSTEES

David Dykes, CUDE, SCMS, President
First Family FCU, Past CSCUF Chair
Bruce Fox, President, Catalyst Corporate FCU
Brent Rempe, I-CUDE, SVP/Chief Strategy
& Growth Officer, Allegiance CU, Cornerstone
DE Assoc.
Rick Powell, Sales Manager,
CUNA Mutual Group
Phillip Crocker, CUDE, CCUFC, Training &
Dev. Mgr., Resource One CU,
Financial Capability Network

FINANCIAL CAPABILITY NETWORK ADVISORY COMMITTEE

Ruby Alvarez,
GECU
Phillip Crocker,
Resource One CU, Chair
Adrian Duran,
FirstLight FCU
Josh Franzen,
InTouch CU
Tiffany Greenway,
TruService Community FCU
Giovanni Monterroso,
Tinker FCU
Priscilla Cisneros Olvera,
A + FCU
Brent Rempe,
Allegiance CU
Lisa Wyman,
Complex Community FCU

YOUR \$ AT WORK

214 GRANTS
TOTALING
\$445,926

FINANCIAL CAPABILITY

- BALANCED Life Reality Fair Kits
- Community Outreach Programs
- Payday Loan Conversion Program
- Save to Win Program
- Money Habitudes

HISPANIC OUTREACH

- Hispanic Opportunity Navigator
- Financial Education
- VITA Sites
- Print Collateral

CREDIT UNION DEVELOPMENT

- 58 Southwest CUNA Management School Scholarships
- 10 Chapters
- 21 Audits
- 19 Equipment Purchases
- 10 YP Leadership Crasher Grants
- 2 Planning Sessions
- 39 Training Calendars Grants - 31 under \$50 million in assets
- Small CU Committee Workshops

COMMUNITY INVESTMENT FUND (CIF)

This unique program offers a benefit to credit unions as well as to state and national programs. The shared investment return provides interest income for participating credit unions, the Cornerstone Credit Union Foundation and the National Credit Union Foundation

38 CIF INVESTORS

More than
\$9.7 MILLION
in combined CIF investments

447 FINANCIAL CAPABILITY

447
FINANCIAL CAPABILITY NETWORK MEMBERS

4
LIFE SIMULATIONS

168

REALITY FAIRS reaching more than 10,280 Students

7
RETIREMENT FAIRS

\$999,851

saved through the SAVE TO WIN program, powered by grants from the Foundation

117
CERTIFIED CREDIT UNION FINANCIAL COUNSELOR (CCUFC) GRADUATES

21
BIZ KIDS ENTREPRENEUR CONTEST ENTRIES

DISASTER RELIEF

An important role for the Foundation is supporting credit union communities in times of disaster within its own region, through the World Council of Credit Unions (WOCCU), or in partnership with the National Credit Union Foundation's CUAid.

TROPICAL STORM IMELDA ASSISTANCE:

7 PHASE II GRANTS
\$17,500

HOUSE FIRES AND FLOODS:

44 PHASE I GRANTS
\$10,950

6 PHASE II GRANT
\$4,000

NEBRASKA FLOODING ASSISTANCE:

\$2,500

TOTAL: \$173,170

MAKING A DIFFERENCE

"We make a living by what we get, but we make a life by what we give." – Winston Churchill

"Not only did the students benefit from the reality fairs, but the parents chose to shadow their children, which also gave them a refresher on budgeting and consumer finance."

Harlene Johnson, Light Commerce CU

FINANCIAL CAPABILITY

DISASTER RELIEF

"I will never forget the Foundation's gracious blessing of helping me after I lost everything in a house fire."

Amy Gonzales, Abilene Teachers FCU

"Thanks to my grant for the Southwest Lending Conference, I learned to be a better leader and to understand that bad things happen to good people, and we are here to help better their financial future."

Deborah Leal, CPSI IBEW FCU

DEVELOPMENT

DEVELOPMENT (CUDE)

My scholarship to attend CUDE changed me personally and professionally; it reignited my passion for "people helping people."

Leanne Mulholland, Coastal Community and Teachers FCU

"I know that three years of SCMS is going to be intense and demanding; the relief of financial stress, thanks to my scholarship, will allow me to solely focus on my professional development."

Courtney Wingo, Las Colinas FCU

SOUTHWEST CUNA MANAGEMENT SCHOOL (SCMS)