

Potential

Improving Lives By Serving Credit Unions, Their Staff & Members



Issue No 24

Summer 2015

PLEASE ROUTE:

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- Finance
- Marketing
- Tellers
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400+ Young Credit Union Members Vie for \$13,000 in College Scholarships

Applicants from 69 MD & DC-based credit unions, the highest participation ever, apply to the MD | DC Credit Union College Scholarship program . . .

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Foundation Thanks Supporters At Recognition Reception

Foundation supporters gathered May 5th at the Oakland Mansion for the Sixth Annual Donor Recognition Reception . . .

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It's a Wicked! Sellout!

Attendees at the ninth annual "Friend Raiser" help raise funds for financial literacy efforts . . .

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Training Grants, Financial Literacy, Emerging CU Support Highlighted In \$170,000 Grant & Program Initiatives

Goal: Exceed the 13,000+ lives impacted last year through Foundation initiatives

The Credit Union Foundation Board of Directors, in approving the largest pool of grant funding in the organization's history, has chosen to focus on credit union staff and volunteer training (see TurnKey insert), financial literacy programs, and assistance for smaller, emerging credit unions. The Foundation also re-committed to heritage programs, including the popular Credit Union College Scholarship offering, the LINX sharing site, and the Credit Union Finder™ mobile device app.

Training Grants For CUs Up To \$150 Million In Assets

Credit unions with up to \$150 million in assets now benefit from the Foundation's Training Grants Program. Under the program, credit unions may apply for training expense reimbursement of up to 75% of the cost of training courses. Applicants select their preferred training provider and reimbursements apply to both in-person and online training.

Financial literacy funding continues to help the Foundation meet credit unions' needs for financial education support and to allow the expansion of the Foundation's Millionaire's Club high school program.

Credit unions of any size may apply for funding to support their financial literacy offerings. Priority is given to those credit unions that participated in the "April Is Financial Literacy Month" campaign and observance.

Roycroft Masters Offer Free Guidance, ALM Assistance

The Roycroft Masters Advisory Program offers free management engagements guided by experienced credit union professionals to more than 100 emerging credit unions

in Maryland and D.C. The volunteer Masters have also pre-negotiated preferred Asset Liability Management Modeling pricing from established ALM Modeling providers and can couple those modeling resources with personal visits to explain and implement modeling.

Additional information on the 2015 grants and programs can be found at the Foundation's newly-renovated website, www.cufound.org.

Don't Miss Wine Me Up! page 3

Johnson Named To Foundation Board of Directors

The Foundation has announced the appointment of Adrian S. Johnson to the Board of Directors. Mr. Johnson is Senior Vice President and Chief Financial Officer for Municipal Employees Credit Union (MECU) in Baltimore, MD.



Adrian Johnson

A 36-year veteran of the financial services industry, Mr. Johnson began his career at MECU in 1998. He holds a BS Degree in Accounting from the University of Baltimore and an MBA from Loyola University Maryland. He is the recipient of numerous awards and recognitions for his professional and charitable achievements.

Elected to leadership positions recently on the Foundation's Board are Chair Donald Tynes, Chair of SECU of Maryland; Vice-Chair Jo Ann Talbot, Vice President, Administration, Market USA FCU; Treasurer Ron Shockley, Vice President, First Financial of Maryland FCU; and Secretary Jacqueline Smith, CEO, Ft. Meade Community Credit Union, Ft. Meade, MD.

Balto. Co. Employees FCU Member Earns Scholarship With Photo-Based Entry



"The coins and the sprout represent watching your money grow even if it starts from something as small as pennies."

That's how Baltimore County Employees FCU member and scholarship winner Autumn Miller described the photo she entered in the Credit Union College Scholarship's photo category.

Judges selected the photo from among sixty-eight images submitted. Applicants were asked to capture the theme, "Thrift," in a single photo.

"This scholarship award will go toward my tuition at Towson University where I'm studying Early Childhood Education," added Miller.

Board of Directors

Donald Tynes, Chair
Jo Ann Talbot, Vice Chair
Ron Shockley, Treasurer
Jacqueline Smith Secretary

Fred Caprio
Maggie Fielding
Adrian Johnson
Janet Oursler
Beverly Zook



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Scholarship Participation Reaches New High; As 401 Members From Sixty-Nine CUs Apply

One Hundred Four Judges Rate Essays, Photos & Video Entries

College-bound members from a record sixty-nine credit unions throughout MD & DC applied on the Foundation's new totally on-line application system this year. The 2015 \$12,000 College Scholarship Program attracted four hundred and one applicants.

"The scholarship is structured so credit unions can promote the scholarship offerings as their own," noted Kyle Swisher, Foundation Executive Director. "We provide the funding, promotion kit, online application and review system, and volunteer judges. This is a perfect way for credit unions large and small to offer a great opportunity to their young members."

One hundred four judges reviewed the essays, videos, and photo submissions to arrive at the top ten essays and top video and photo entries.

View all winning entries:
cufound.org

Participating Credit Unions



Millionaire's Club Teams Earn Top MD State Honors

The SECU-sponsored Millionaire's Club at Howard County's Applications & Research Lab produced first and second place teams in the recent Maryland Personal Finance Challenge. The state champions now travel to Kansas City, KS to compete for the national title against high school teams from across the country.

Millionaire's Club members won top national honors in 2014.





Wine Me Up! Event Supports Training Grants

Wine Me Up! is the Foundation's new, fun way to support training grants for credit union professionals and volunteers.



Here's how it works:

- 🍷 Friends of the Foundation are invited to donate wine to Wine Me Up!
 - 🍷 Attendees at the MD | DC Credit Union Association Annual Meeting & Convention (June 7 to 10, 2015 in Ocean City, MD) may purchase \$20 wine tickets at the Foundation's exhibit booth.
 - 🍷 Each ticket allows the holder to "pull" a covered bottle of wine from the selection available at the Foundation's exhibit booth. The wines range in value from \$10 to \$200+.
 - 🍷 It's like an adult grab bag!
- Complete Wine Me Up! details are available at www.cufound.org/how-you-can-help/wine-me-up/
- Donate a bottle of wine and/or purchase a ticket at the MD | DC CUA convention - either way you're supporting important training grants!

Keen Eye Could Earn You \$200 Cash Reward!



To encourage readership and add a little fun to *Potential*, we're awarding \$50 per issue to one lucky reader who finds and reports their winning number. The award grows with each issue that the prize goes unclaimed and now stands at \$200!

Alongside your name on the address section of this issue of *Potential* is a number that stands perpendicular to your name and address. Find that exact number printed in **blue ink** elsewhere in this issue, report it to the Foundation at info@cufound.org, and you win the entire pot!

Readers must respond with their winning number within 30 days of publication by calling (443) 325-0771 or emailing info@cufound.org

Only subscribers whose addresses are on file with the Foundation have assigned numbers, so make sure you're on our mailing list. Read *Potential* carefully, your number may be in this very issue!

Foundation Honors Generous Contributors At May 5th Donor Recognition Reception

Foundation donors gathered at the historic Oakland Mansion in Columbia, MD for a recognition reception sponsored by Allied Solutions; Burns-Fazzi, Brock; and Vantiv. The Foundation Board hosts the annual event to thank those who make its charitable works possible. For more images visit cufound.org.



Improving Lives By Helping Credit Unions Serve Their Members & Communities

<i>2015 Annual Appeal</i>	Chairman's Club	Leadership Circle	Benefactor	Donor
Credit Unions As a % of Assets*	.0025% (Minimum: \$300)	.001% to .0024% (Minimum: \$200)	.0002% to .001% (Minimum: \$100)	<.0002%
Businesses & Organizations	\$1,000+	\$750 - \$999	\$500 - \$749	Up to \$500
Individuals	\$300+	\$200 - \$299	\$100 - \$199	Up to \$100

* Credit Unions, use the on-line Recognition Calculator at cufound.org/how-you-can-help/make-a-donation/ to easily calculate donor recognition levels

I am proud to be a supporter of the Credit Union Foundation of MD & DC! Apply my gift:

Enclosed is my deductible donation of \$ _____

- Where The Need Is Greatest
- Direct Grants To Help Credit Unions
- Endowment Fund For The Future
- CU Staff Training Scholarships
- Small Credit Union Development Programs
- Financial Literacy Initiatives

- Contact me about the Community Investment Fund
- Contact me about the Giving Investment Fund Term CD

Mail to: **CU Foundation**
PO Box 190
Glenelg, MD 21737-0190

Your Tax-Deductible Gift Is Greatly Appreciated!

Over \$45,000 Raised Through Annual Events To Support Financial Literacy

Wicked! "Friend Raiser" Sells Out!

The Foundation's ninth annual "Friend Raising" event was held April 19th with the Broadway production of Tony Award-winner, *Wicked!*, and a pre-show champagne brunch. "I'm so grateful for our sponsors and patrons who helped us produce this ninth consecutive sell-out," noted Advancement Chair Jo Ann Talbot. "It was a *wicked* good time!"



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