

CAROLINAS CREDIT UNION FOUNDATION

2019

Awards Gala

JANUARY 29, 2020



A Special Thanks

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2019 Awards Gala HONOREES

2019 CUNA STATE-LEVEL WINNERS

CAROLINA FOOTHILLS

CAROLINA TRUST

FAMILY TRUST

PALMETTO CITIZENS

TRULIANT

SRP

2019 HEROES

STEVE HARKINS

Lifetime Achievement
CEO, SC Telco FCU

BILL SMITH

Lifetime Achievement
Volunteer, Coastal CU

STEVE SMITH

Lifetime Achievement
CFO, Sharonview FCU

DEB MCLEAN

Individual Achievement
VP Marketing & Business Development, Nova CU

COASTAL CREDIT UNION FOUNDATION

Partner in Philanthropy

2019 AWARDS GALA EMCEE

CREIGHTON BLACKELL, CUDE

Vice President, Corporate Affairs and Community Engagement, Coastal CU



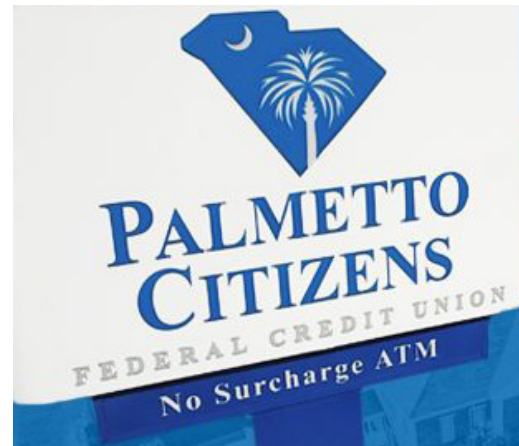
DESJARDINS

ADULT FINANCIAL EDUCATION AWARD

The Desjardins award program was created to recognize leadership within the credit union movement on behalf of financial literacy for all ages. Named after credit union pioneer Alphonse Desjardins, the program emphasizes the movement's longtime commitment to youth and personal financial education.

1ST PLACE | PALMETTO CITIZENS FCU | 250 MILLION-\$1 BILLION IN ASSETS

Palmetto Citizens partnered with WACH FOX 57 to create monthly, two-minute videos to provide South Carolina citizens with basic money management and financial planning tools in a news segment called "MoneyWACH." In its 9th consecutive season, MoneyWACH reaches approximately 500,000 people across the Columbia market.

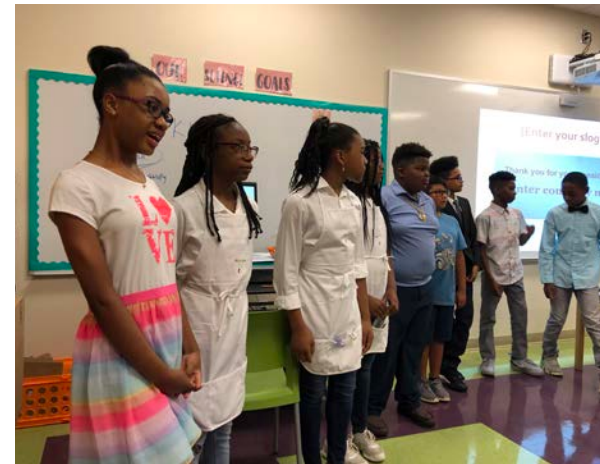


DESJARDINS

YOUTH FINANCIAL EDUCATION AWARD

1ST PLACE | CAROLINA FOOTHILLS FCU | \$50 MILLION-\$250 MILLION IN ASSETS

Carolina Foothills served as the financial host of the mini-camp with Business and Entrepreneurial Students Together (BEST) Carolina, LLC. The goals for "Minding Your Own Business" were for students to: (1) develop an entrepreneurial mindset and learn the value to the economy and how entrepreneurs help address social challenges; (2) explore supply and demand, direct and indirect competition and competitive pricing; (3) understand a business model; and (4) learn record-keeping, accounting and government regulation. The week-long learning culminated in a "Shark Tank" business pitch competition by the student campers with judges from Carolina Foothills.



DESJARDINS

YOUTH FINANCIAL EDUCATION AWARD

1ST PLACE | SRP FCU | \$250 MILLION-\$1 BILLION IN ASSETS

SRP created an interactive “Spend...Save...Share” program developed to teach children how to manage their money in a responsible manner. The course can be modified to fit all age and grade levels and includes relevant statistics of poor financial decisions and a game that simulates how a budget works. In the classroom, SRP discusses how to save money wisely, how to spend it effectively and how to share with the community. More than 7,000 students in North Augusta, SC and surrounding communities are exposed to SRP’s financial literacy initiatives each year.



DESJARDINS

YOUTH FINANCIAL EDUCATION AWARD

2ND PLACE | PALMETTO CITIZENS FCU | \$250 MILLION-\$1 BILLION IN ASSETS

For the 4th consecutive year, Palmetto Citizens held a Reality of Money simulation at its annual Teens & Money Workshop. Participants were given real-life scenarios to teach them about the impact that financial choices will have on their budgets and lifestyles as they enter adulthood. The experience is designed to be both fun and informative to help the participants to be better prepared for their future. Participants also learn other lessons, such as the value of getting an education, developing and maintaining a good credit score, and using credit cards wisely.



1ST PLACE | TRULIANT FCU | MORE THAN \$1 BILLION IN ASSETS

In 2016, as a way of celebrating 200,000 member-owners, Truliant Federal Credit Union launched the Financial Education Grant Fund with a commitment to award \$200,000 in grant funds to public school teachers over the next five years. 2018-19 marked year three of the program, which provides funds to public school teachers, grades 6-12, who wish to incorporate personal finance and career development in their classrooms. In the past three years, Truliant has awarded more than \$120,000 to 32 schools, reaching a total of more than 41,000 students. In the 2018-19 school year, 10 grants were issued (nine schools and one school system), impacting more than 4,500 students.



DORA MAXWELL

SOCIAL RESPONSIBILITY COMMUNITY SERVICE AWARD

The Dora Maxwell Social Responsibility Community Service Award is given to a credit union for its external social responsibility projects within the community.

1ST PLACE | FAMILY TRUST FCU | \$250 MILLION-\$1 BILLION IN ASSETS

Family Trust established a new Community Partnership Grant Program, donating \$60,000 to 27 non-profit organizations in the first year. Grants were provided to emergency shelters, food pantries, and organizations who support families, children and those with special needs. The credit union also gave employees eight hours of paid volunteer time. This initiative led 100 employees to serve 800 paid volunteer hours at non-profits. Overall, the credit union gave \$143,632 in charitable donations, sponsorships and time in a single year in York County, SC



DORA MAXWELL

SOCIAL RESPONSIBILITY COMMUNITY SERVICE AWARD

2ND PLACE | CAROLINA TRUST FCU | \$250 MILLION-\$1 BILLION IN ASSETS

Carolina Trust is leading an anti-bullying community campaign in collaboration with a local news station, law enforcement and partnership with former NFL player, Ricky Sapp and his foundation. The campaign has grown after its first year with now 31 local schools participating from Horry County and Southern Florence County in South Carolina. Fifth-grade students are provided resources on bullying prevention, its effects, and how to report it, and are asked to take an anti-bullying pledge. Nearly 4,000 students have taken the I'm A Buddy, Not A Bully pledge in the last two years, and plans are underway for continued growth thanks to the new partnership with the Ricky Sapp Foundation.



3RD PLACE | SRP FCU \$250 MILLION-\$1 BILLION IN ASSETS

SRP's Affinity Debit Card program, in partnership with local high schools is unique, innovative and has been wildly successful. Each participating high school works with SRP to develop an exclusive debit card design and each time the school's card is used for a purchase, the school receives a donation that is derived from SRP's interchange income. The program is accompanied by a financial literacy component, which creates a magical result. To date, 23 schools are participating in SRP's Affinity Debit Card Program with more than \$235,000 made in donations to local high schools!



LOUISE HERRING

PHILOSOPHY IN ACTION MEMBER SERVICE AWARD

The Louise Herring Philosophy-in-Action Member Service Award is given to a credit union for its practical application of credit union philosophy within the actual operation of the credit union. It is awarded for internal programs and services that benefit membership.

1ST PLACE | CAROLINA FOOTHILLS FCU | \$50-\$250 MILLION IN ASSETS

Carolina Foothills partnered with the City of Spartanburg on a 10 week program to engage, teach, coach and lend to African American start-up businesses. This initiative specifically targeted development and support for African American owned businesses and businesses seeking to locate within African American communities. The City of Spartanburg agreed to keep \$25,000 on deposit at the credit union as a loan-loss reserve fund and the credit union can grant micro loans in the amount of \$1,000 to \$15,000 for these start-ups. Now it is 2nd year, the renamed "Amplify" African-American Business Incubator Program has grown to 8 loans totaling \$113,000.00.

Carolina Foothills was recognized nationally for its efforts and awarded 1st place for the Louise Herring Award in CUNA's nationwide competition.



LOUISE HERRING

PHILOSOPHY IN ACTION MEMBER SERVICE AWARD

1ST PLACE | CAROLINA TRUST FCU | \$250 MILLION-\$1 BILLION IN ASSETS

Carolina Trust stepped up in a big way for its members following the devastation of Hurricane Florence on the coastal and inland communities in September 2018. Carolina Trust waived ATM fees, extended a 10-day grace period on loans, provided "skip-a-pay" options and implemented a disaster relief loan for its members to assist with damages and restoration efforts. The maximum amount for this loan was \$3,000 with a fixed rate of 1.99% APR and a maximum term of 24 months. Ultimately, 140 Skip-A-Pays were remitted, \$28,951 in loans were made and \$20,094 in fees were refunded to members.

Carolina Trust was recognized nationally for its efforts and awarded 2nd place for the Louise Herring Award in CUNA's nationwide competition.



2ND PLACE | PALMETTO CITIZENS FCU | \$250 MILLION-\$1 BILLION IN ASSETS

Palmetto Citizens implemented a new Financial Education Team whose responsibility was to comprehensively evaluate and enhance the internal tools and resources used by the credit union. New education modules, quizzes and secret shops were implemented with the goal of increasing staff product knowledge and their ability to identify the best solutions when working to understand a member's financial situation.

HERO HONOREES



STEVE HARKINS

Lifetime Achievement Award
SC Telco FCU | CEO

Recognized for his commitment to his credit union's growth and success, to the communities of the SC Upstate and for his impact on our industry. Having served as the CEO of SC Telco for nearly 30 years, Steve is set to retire in April 2020.



BILL SMITH

Lifetime Achievement Award
Coastal CU | Volunteer

Recognized for his service to Coastal and to its membership. Bill is Coastal's longest-serving board member, and has been a volunteer with the credit union for 48 of its 52 years.



STEVE SMITH

Lifetime Achievement Award
Sharonview FCU | CFO

Recognized for his outstanding efforts in establishing key drivers for the managed growth of Sharonview over the last 21 years. When Steve joined the credit union in 1998, Sharonview's assets totaled \$275 M; today its assets are over \$1.6 B. Steve is set to retire at the end of the year.

HERO HONOREES



DEB MCLEAN

Individual Achievement Award
Nova CU | VP Marketing & Business Development

Recognized for her recent successes with Nova's rebrand and the creation of the innovative, growth-generating Priority Payday Program. Deb has been a trailblazer and passionate marketing professional in the credit union movement for over 34 years.



COASTAL CREDIT UNION FOUNDATION

Partner in Philanthropy

Recognized for its dedication to community non-profits that support financial education, increase affordable housing and promote financial well-being. Coastal's charitable contributions are primarily made through the Coastal Credit Union Foundation, which is funded by member debit card activity (equating to a penny per swipe directed to the Foundation). Over the last eight years since forming the Foundation, Coastal has contributed \$1.6M to local non-profits.



Congratulations
to all of this year's honorees

Past Heroes

2018	LIFETIME ACHIEVEMENT AWARD MARK SCHAEFER Truliant FCU, CEO PARTNER IN PHILANTHROPY AWARD ROBERT HARRIS Health Facilities FCU, CEO PARTNER IN PHILANTHROPY AWARD UPSTATE CHARITABLE GIVING COMMITTEE
2017	INDIVIDUAL ACHIEVEMENT AWARD CATHY PACE Allegacy FCU, President/CEO LIFETIME ACHIEVEMENT AWARD DORINDA EDWARDS American Partners CU, President/CEO LIFETIME ACHIEVEMENT AWARD JOHN RADEBAUGH Carolinas Credit Union League, President/CEO LIFETIME VOLUNTEER ACHIEVEMENT AWARD MARIA SCANGA Latino Community CU, Board Chair
2016	INDIVIDUAL ACHIEVEMENT AWARD MARK CURRAN Lion's Share FCU, President/CEO LIFETIME ACHIEVEMENT AWARD JERRY MILLER Carolina Trust FCU, President/CEO LIFETIME VOLUNTEER ACHIEVEMENT AWARD JOAN NELSON Coastal CU, Volunteer/Board Chair PARTNER IN PHILANTHROPY AWARD CREATIVE BUILDERS, INC.
2015	INDIVIDUAL ACHIEVEMENT AWARD GENICE DECORTE Healthshare CU, President/CEO LIFETIME ACHIEVEMENT AWARD GLENN KIRK Summit CU, Board of Directors/Treasurer/Trustee PARTNER IN PHILANTHROPY AWARD YOUR MARKETING CO.
2014	INDIVIDUAL ACHIEVEMENT AWARD DAVID BREHMER First Carolina Corporate CU, President/CEO INDIVIDUAL VOLUNTEER ACHIEVEMENT AWARD TRAVIS WALTERS SPC CU, Board Chairman LIFETIME ACHIEVEMENT AWARD JOHN CARLSON Sharonview FCU, President/CEO LIFETIME VOLUNTEER ACHIEVEMENT AWARD GEORGE PRICE Piedmont Advantage CU, Board Member PARTNER IN PHILANTHROPY AWARD CUNA MUTUAL GROUP

The Celebration Isn't Over Yet

Please join us following the Awards Gala for more networking, celebration and fun at the Gatsby Afterparty! Hosted by the Young Professionals of the Carolinas, it's an affair you don't want to miss.

Admission is free! CJ's is just next door and it has been transformed into a Speakeasy Casino. You can walk right in and immediately step up to the tables of Blackjack, Poker, Rolette, and Craps!

If you decide to play, we will gladly accept your \$20 tax-deductible donation to support the Carolinas Credit Union Foundation. You can pay at your leisure at the donation counter. Your \$20 also gives you a chance to enter the raffle for a \$500 gift card to the Grandover Resort, golf and spa destination in Greensboro, NC. Even if you don't play, a \$20 tax-deductible donation offers you a chance to win!



**\$20 RAFFLE TICKETS
OR 5 FOR \$100**



**\$500 GIFT CARD
DONATED BY:**



DELUXE CASH BAR

Specialty Drinks
Moonshine
The Ritzy Sidecar
Bourbons - High West American Prairie, Old Forester 1897 Bottled in Bond,
Woodford Double Oaked, Knob Creek.

Cash and credit cards accepted at the bar and donation counter!

www.carolinasfoundation.org

