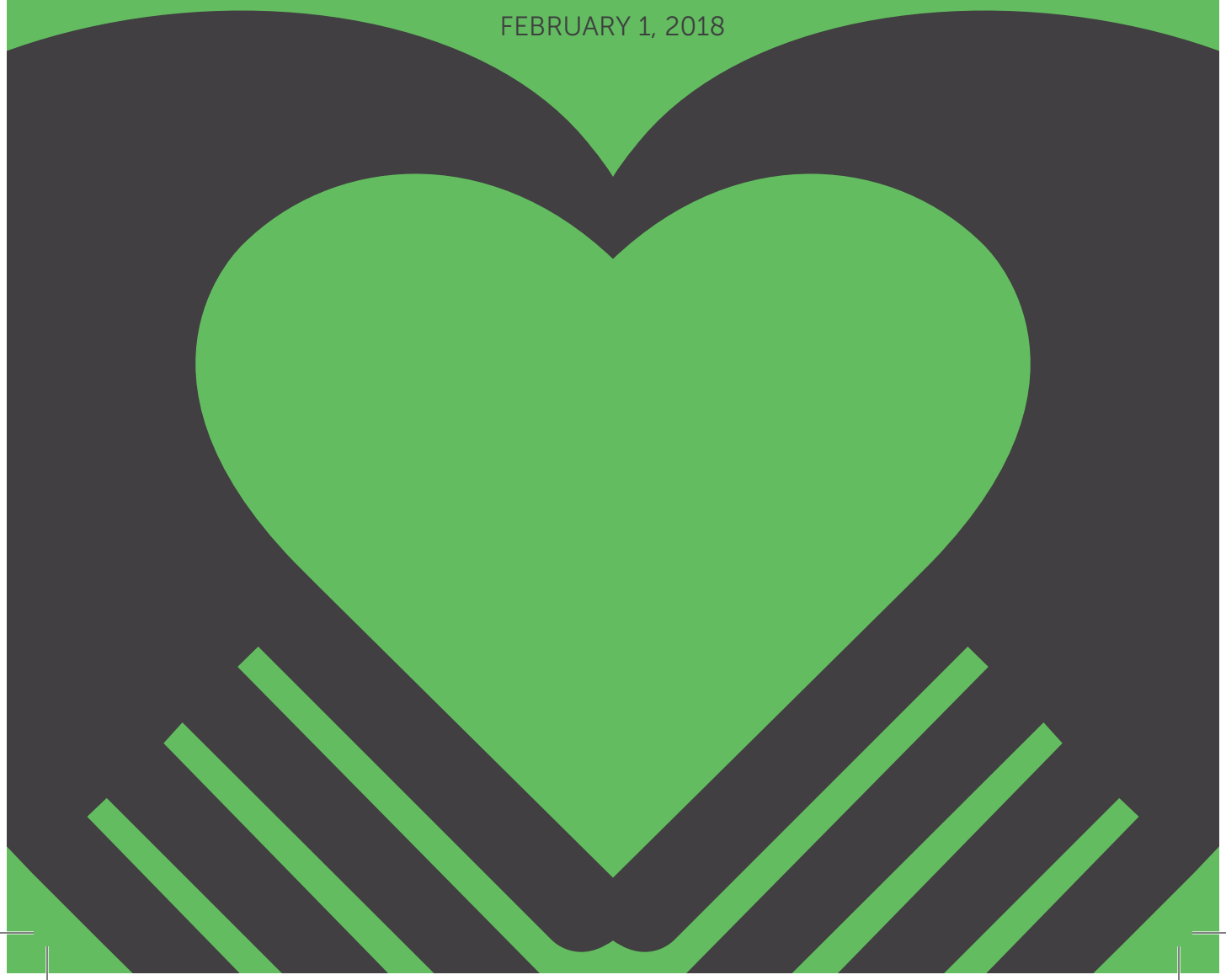


CAROLINAS CREDIT UNION FOUNDATION

2017

Awards Gala

FEBRUARY 1, 2018



PRESENTED BY



PREMIER SPONSOR



PRESENTING SPONSOR



DINNER SPONSOR



TABLE SPONSORS



2017

Awards Gala

5:30-7:00pm

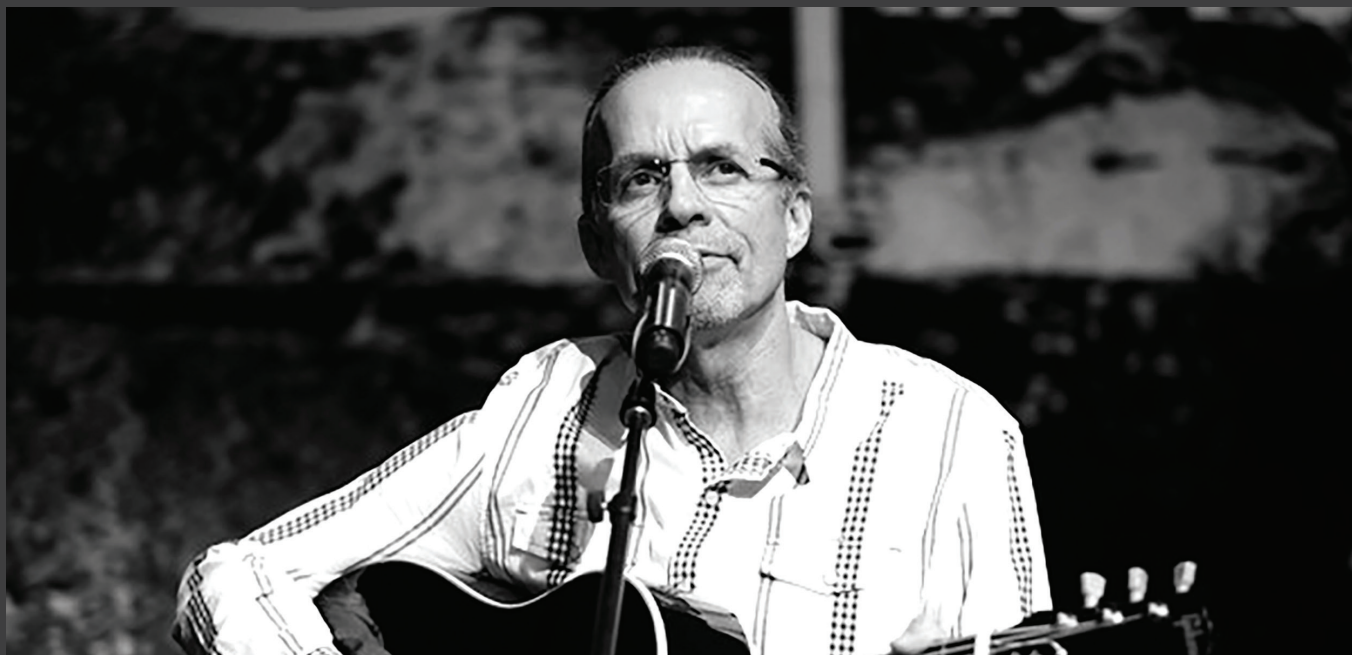
COCKTAIL RECEPTION

7:00-7:45pm

PLATED DINNER SERVICE

7:45pm

AWARDS PRESENTATION AND ENTERTAINMENT



We all know **Kyle Petty** for his connection to Victory Junction but most are unaware that this former race car driver turned racing analyst has always carried a passion for music. The Foundation is honored to have Kyle join us for a performance of his favorite songs.

2017 Honorees



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

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

Desjardins

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.

ADULT FINANCIAL EDUCATION AWARD \$250 MILLION - \$1 BILLION IN ASSETS



FIRST PLACE

PALMETTO CITIZENS FCU

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*.

YOUTH FINANCIAL EDUCATION AWARD \$250 MILLION - \$1 BILLION IN ASSETS



FIRST PLACE

PALMETTO CITIZENS FCU

Palmetto Citizens partners with a local college professor to offer BIZ Camp, a fun and exciting way to learn about entrepreneurship. The camp helps students learn what it takes to turn an idea into a viable business.

SECOND PLACE

SC STATE CU

SC State CU traveled to Ware Shoals High School and presented the Realities of Money simulation to 70-plus juniors and seniors to equip students with the tools and understanding to start off adult life in good financial shape.



YOUTH FINANCIAL EDUCATION AWARD MORE THAN \$1 BILLION IN ASSETS



FIRST PLACE TRULIANT FCU

To celebrate the milestone of reaching 200,000 member-owners, in 2016 Truliant made a commitment to provide \$200,000 over the next five years to area teachers who wish to teach financial education. Grant applicants are selected and the winners are ultimately determined by public voting.



**SOUTH CAROLINA
FEDERAL**
CREDIT UNION

SECOND PLACE SC FCU

In 2016, SC Federal awarded \$10,000 in scholarship prizes to eight area students. SC Federal hosted two scholarship competitions, one for community members, and one for Bank at Work employers and their dependents.

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.

\$50 MILLION - \$250 MILLION IN ASSETS



FIRST PLACE SPC CU

In celebration of SPC's 75th Anniversary, "75 Days of Kindness" was designed to promote the value of good deeds for others. Their goal was to inspire the community to pay forward the kindness, creating a ripple effect of goodness.



SECOND PLACE GREENVILLE FCU

Greenville Federal Credit Union successfully launched a student-run credit union branch inside a local high school during the 2016-2017 school year. Students earned course credit and gained hands-on experience as they managed and operated a fully functioning branch.



THIRD PLACE GEORGETOWN KRAFT CU

For over 30 years, Georgetown Kraft CU has held the tiny hands, feet and hearts of the babies for March of Dimes. Truly a team effort, employees from all four GKCU branches get involved on some level, whether fundraising or volunteering for the local March of Dimes chapter.

\$250 MILLION - \$1 BILLION IN ASSETS



FIRST PLACE FORT BRAGG FCU

In 2016, Fort Bragg Federal Credit Union focused its social responsibility efforts on the "fitness" of the military community of Fort Bragg, including single soldiers, families, children, and family members of sick or injured soldiers.



SECOND PLACE FAMILY TRUST FCU

Family Trust celebrated its 60th Anniversary in 2017 by encouraging employees to take on projects that serve our community. Projects ranged in size from putting stickers on books for a reading group, planting a full garden, and donating proceeds to a shelter for homeless women and children.



THIRD PLACE HERITAGE TRUST FCU

Heritage Trust hosted a variety of employee and community fundraisers to benefit the American Cancer Society through its signature event, Relay For Life. This was a company-wide initiative and all 204 employees participated through internal initiatives and in-branch donation drives with the membership.

MORE THAN \$1 BILLION IN ASSETS



FIRST PLACE

LOCAL GOVERNMENT FCU

As part of a two-pronged initiative, LGFCU partnered with UNC School of Government to support the creation of the Development Finance Initiative, a center of excellence that provides specialized finance and development expertise to guide local governments in attracting private investment for transformative projects.



SECOND PLACE

COASTAL CU

The Second Annual Power of Sharing Gala combined the efforts and financial resources of Coastal Credit Union Foundation with various corporate, community and business partners throughout the Triangle to recognize the incredible work and impact that non-profit organizations have on our communities.



THIRD PLACE

TRULIANT FCU

#TeamTruliant Employee Charities raises money from more than 600 employees to support the American Heart Association, March of Dimes, Relay for Life, and United Way. The charitable committee broke its record and raised nearly \$103,000 in 2016.

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.

\$50 MILLION - \$250 MILLION IN ASSETS



FIRST PLACE

CAROLINA FoothILLS FCU

Carolina Foothills Federal Credit Union designed a service, called the Right Path, tailored for 18-24 year olds who wanted to get their first car loan without a cosigner. Certified financial counselors on staff were used to guide and direct these young adults down a pathway to financial success.

\$250 MILLION - \$1 BILLION IN ASSETS



FIRST PLACE

HERITAGE TRUST FCU

In the Fall of 2016, Heritage Trust partnered with Trident Technical College's Youth Apprenticeship Program, which allows high school students the opportunity to receive on-the-job training while completing their education and pursuing college-level courses.

MORE THAN \$1 BILLION IN ASSETS



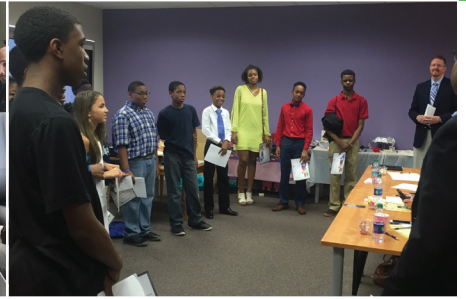
FIRST PLACE

COASTAL CU

Coastal's Development Educators collaborated to create a special principles and philosophy workshop for non-management employees, providing them with a deeper knowledge of cooperatives and how the credit union can better serve our members. Coastal's DEs built their intensive, two-day training using the program structure of the Carolinas CUDEs' P&P Conference.

Congratulations

TO ALL OF OUR 2017 AWARD WINNERS



THE PAGES THAT FOLLOW
HIGHLIGHT THE IMPACT OF THE FOUNDATION
IN THE CAROLINAS AND THE MANY GENEROUS
SUPPORTERS THAT MAKE IT POSSIBLE.

A Special Message from the President



I am honored and privileged to serve at the helm of the Carolinas Credit Union Foundation, an organization founded 25 years ago with a mission to enrich the lives of children. 2017 proved to be another outstanding year of growth and many of those accomplishments are in the adjacent impact report. It is because of your generous support that the Foundation is able to stay committed to the great strength of the cooperative spirit.

The Foundation is strengthening our focus on communities throughout the Carolinas and on our partnerships with credit unions in philanthropy. Thank you for your dedication and trust in the Carolinas Credit Union Foundation and I hope you will consider new opportunities for collaboration from the highlights below.

REACH – DELIVERING MORE SMILES IN THE CAROLINAS

The Foundation's partnership with Victory Junction's Reach Program started in 2015 to help bring an uplifting experience to families and children in hospitals and Ronald McDonald Houses in every corner of the Carolinas. Because of our \$800,000 financial pledge, the Reach program is now in every Ronald McDonald House and almost every children's hospital in both states, and plans to further expand are in the works. The Foundation is very proud that the Reach Program has helped bring smiles to more than 17,000 to-date, at a time when smiles are so rare.

In 2017, we hosted two Reach Carnivals led by close to 100 credit union volunteers in Charleston and Greenville, South Carolina, and four more Carnivals are planned for 2018. Other credit union-sponsored volunteer opportunities are also available for the Reach Program.

SCHOLARSHIP PROGRAMS – EMPOWERING OUR YOUTH

The Foundation has a General Scholarship Fund made possible by your credit union's support. This specific scholarship is available to any credit union member and is awarded based on academic performance, community leadership, and financial need. The Foundation also manages scholarship programs for individual credit unions and chapters at a minimal cost through the Scholar Vision Fund. Our turnkey offering allows your credit union a simplified process for scholarship program management.

PROFESSIONAL DEVELOPMENT GRANTS – SUPPORTING OUR SMALL CREDIT UNIONS

The Foundation focuses on initiatives productive to the educational development and growth of credit union employees and volunteers from our credit unions with less than \$50 million in assets. The Carolinas Foundation awards grants to cover conference fees and has now expanded grants to include webinar offerings and volunteer development. Completed grant applications are welcome at any time.

DONOR-ADVISED FUND MANAGEMENT – CHAMPIONING LOCAL CHARITIES

The Foundation helps credit unions and even chapters with charitable giving, with the added benefit of tax-deductibility to all donors who make a contribution. We streamline all grant requests from credit unions or chapters for 501(c)(3) organizations, simplifying your charitable giving. A donor-advised fund can be formalized and marketed by your credit union as your own foundation without the annual IRS filings. Charitable donation account (CDA) proceeds may even be deposited into your donor-advised fund for distribution in your local communities.

Thank you again for the support and for your dedication to the communities you serve.

Lauren Whaley

2017

IMPACT REPORT



FOUR

distinct honorees
presented for
Individual Achievement &
Partner in Philanthropy
Awards

TWENTY

awards given to credit unions
for their commitment to
social responsibility,
credit union philosophy
and financial education



100s

of credit union volunteer
hours committed to Reach



7,000+

children experienced
Reach camp magic
this year alone

22

partnership sites in every corner
of the Carolinas



More than a
half million

dollars in disaster relief aid
provided by credit unions
in the Carolinas



\$45,000

provided by the
Foundation's Disaster Relief Fund

\$22K

in scholarships awarded
by the Foundation

A DOZEN

professional development
grants provided
to credit unions with
less than \$50 million in assets

The Carolinas Foundation is your partner in philanthropy through the management and disbursement of funds for credit unions and chapters.

\$250K

in grants to non-profits

\$220K

in scholarship funds

Foundation General Fund

SUPPORTERS

GENERAL FUND SUPPORTERS

Abbeville Community FCU, Acclaim FCU, American Partners FCU, AnMed Health FCU, Blue Flame CU, Brookland FCU, Carolina FCU, Carolina Foothills FCU, Carolina Postal CU, Carolina Trust FCU, Carolinas Telco FCU, Century Employees Savings Fund CU, Charlotte Fire Dept CU, Charlotte Metro FCU, Coastal CU, Columbia Post Office CU, Comm-scope CU, Dill Federal CU, Edisto FCU, Electel Cooperative FCU, Emerald Credit Assn FCU, Emergency Responders CU, Fayetteville Postal CU, First Carolina People's CU, Greater Abbeville FCU, Greensboro Municipal FCU, Greenville FCU, Greenwood Municipal FCU, GUCO CU, Health Facilities FCU, Healthshare CU, Heritage Trust FCU, Lion's Share FCU, Local Government FCU, Members CU, Mountain CU, Neighbors United FCU, Nucor Employees CU, Palmetto First FCU, Palmetto Health CU, Palmetto Trust FCU, Pee Dee FCU, Piedmont Advantage CU, Premier FCU, Riegelwood FCU, SCI FCU, S.C.H.D. DIST #7 FCU, S.C. STATE FCU, S.C. TELCO FCU, Santee Cooper CU, Sharonview FCU, Shuford FCU, South Carolina FCU, Spartan FCU, Spartanburg City Employees CU, SPC CU, Summit CU, Sumter City CU, TCP CU, Team & Wheel FCU, Telco Community CU

PAYROLL DEDUCTION SUPPORTERS

Carolinas Credit Union League, Vizo Financial

COMMUNITY INVESTMENT FUND SUPPORTERS

Carolina Foothills FCU, Greenville Heritage FCU, Greenville FCU, Lion's Share FCU, SC Telco FCU

CHARITABLE DONATION ACCOUNT SUPPORTERS

Sharonview FCU, Charlotte Metro FCU

OTHER SOURCES

Amazon Smile Shoppers, Cast and Blast Sponsors, The Foundation's Board of Directors

Your contribution to the Foundation's General Fund helps pay for our annual expenditures including compensation, accounting services through the League, outside legal and CPA fees, the Foundation's academic and financial-aid scholarships provided to credit union members in the Carolinas, and professional development grants to small credit unions.

Disaster Relief Fund

SUPPORTERS

HELPING THE CREDIT UNION COMMUNITY IN TIMES OF NEED

In 2017, four major disasters empowered credit unions in the Carolinas to donate more than \$568,000 in disaster relief aid. Dollar-for-dollar, all donations collected by the Carolinas Foundation were disbursed at the request of the donor to the National Credit Union Foundation and World Council of Credit Unions for distribution in the areas affected by hurricanes and wildfires. The Carolinas Foundation's own Disaster Relief Fund provided matched grants totaling \$15,000.

SUPPORT FROM CREDIT UNIONS

Carolina Trust FCU-\$1,000
Charlotte Metro FCU Foundation-\$5,000
Coastal CU-\$300,000
Coastal CU Foundation-\$10,000
Duke FCU-\$500
Electel Cooperative FCU-\$380
Founders FCU-\$25,000
Greensboro Municipal FCU-\$5,000
Greenville FCU-\$10,000
Lion's Share FCU-\$2,500
Local Government FCU-\$100,000
Mid-Carolina CU-\$120
Mountain CU-\$6,810
MTC FCU-\$10,000
Nova CU-\$5,000
Piedmont Advantage CU-\$1,000
Premier FCU-\$1,610
Riegelwood FCU-\$500
Santee Cooper CU-\$1,000
SC Telco FCU-\$20,000
SC FCU-\$10,000
Tarheel Chapter-\$2,000
Vizo Financial-\$30,000

\$547,420

SUPPORT FROM INDIVIDUALS

\$5,860

Reach Fund

SUPPORTERS

DIRECT FINANCIAL SUPPORTERS

Acclaim FCU, Carolina Foothills FCU, Electel Cooperative FCU, Founders FCU, Healthshare CU, Piedmont Advantage CU, SAFE FCU, Santee Cooper CU, Shuford Federal CU, Vizo Financial, Winston-Salem FCU, Lowcountry CUaware Chapter, North Piedmont Chapter, Piedmont Chapter, 2017 Carolinas Cup Participants, Donors and Sponsors, 2017 League Annual Meeting Auction Donors and Participants

PAYROLL DEDUCTION SUPPORTERS

Acclaim FCU, Blue Flame CU, Carolinas Credit Union League, SAFE FCU, SC State FCU, Vizo Financial

VOLUNTEER SUPPORTERS

Carolina Foothills FCU, Carolinas Credit Union League, Charlotte Metro FCU, CPM FCU, Duke FCU, Family Trust FCU, Greenville FCU, Greenville Heritage FCU, Heritage Trust FCU, Latitude 32 FCU, Lion's Share FCU, Santee Cooper CU, SC Telco FCU, Sharonview FCU, South Carolina FCU, Your Marketing Company



Fundraising Event

SUPPORTERS

CAST AND BLAST

More than \$4,000 raised

SPONSORS: "PERFECT CASTER" Carolinas Credit Union League, Coastal CU

LEAGUE ANNUAL MEETING SILENT AUCTION

More than \$8,000 raised

Donors: American Partners FCU, Carolina Trust FCU, Carolinas Credit Union League, Century Employees' Savings Fund CU, Charlotte Metro FCU, Coastal CU, Consultants and Builders, Inc., CO-OP Financial Services, Cooperative Council of North Carolina, Creative Builders, Inc., CU Companies, CUNA Mutual Group, Evelyn Hawthorne, Family Trust FCU, Founders FCU, Frankie DeDonato, Golden Eagle Insurance, Greenville FCU, HealthShare CU, Heritage Trust FCU, Kasasa, Lion's Share FCU, Mountain CU, MY CU Services, Palmetto Citizens FCU, Palmetto Health CU, Piedmont Advantage CU, Premier Federal CU, Route 66 Extended Warranty, SAFE Federal CU, SC Telco FCU, SI Solutions CU Group, South Carolina FCU, SPC CU, SRP FCU, TriNet Financial Services, Truliant FCU, USA ELT, Vizo Financial, Works24

CAROLINAS CUP (Save the date: October 14-16, 2018)

\$45,000 raised

Sponsors: "Camp Champion"-\$5,000 Carolinas Credit Union League, Charlotte Metro CU, Coastal CU, CUNA Mutual Group, Local Government FCU, The Warranty Group
"Smile"-\$2,500 Founders FCU, Lion's Share FCU **"Fun Funder"-\$1,000**, AdvantEdge Analytics, ATM Response, Credit Union Service Company of Virginia, LLC, Greenville FCU, Greenville Heritage FCU, Howe Construction, Inc., Members CU, One Digital Health and Benefits, PFP Services, StateNational, Truliant FCU **"Table"-\$1,000** Founders FCU, Sharonview FCU, South Carolina FCU

Auction Donors: Aloft Hotels Charlotte Ballantyne, Ballantyne Hotel & Lodge, Carolina Hurricanes, Carolinas Credit Union League, Charlotte Hornets, Charlotte Metro FCU, Charlotte Motor Speedway, Clark Little, Coastal CU, CUNA Mutual Group, Dabos All In Foundation, Debbie Holt, Duke University, Family Trust FCU, Founders FCU, Greenville FCU, Innovative Business Solutions, LLC, Jeff Kloss, Jennifer Parker & Randy Coleman, Ken Bickel, Credit Union Solutions, Kim Cook, Kingston Plantation, Lauren Whaley, Lion's Share FCU, NASCAR Hall of Fame, Piedmont Advantage CU, Pinehurst Resort, South Carolina FCU, SC Telco FCU, SPC CU, The Warranty Group, Tommy Bahama-Myrtle Beach, Total Wine, Truliant FCU, University of SC, Victory Junction



Mark Caverly, Chair
Local Government FCU
Raleigh, NC



Willard Ross, Vice-Chair
Coastal CU
Raleigh, NC



Bob Bruns, Treasurer
Charlotte Metro FCU
Charlotte, NC



Bonnie Ciuffo, Secretary
South Carolina FCU
N. Charleston, SC



Brian Sponaugle,
Immediate Past Chair
Greenville FCU
Greenville, SC



John Slack
CUNA Mutual
Greensboro, NC

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David Brehmer
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John Radebaugh
Carolinas CU League
Raleigh, NC



— CAROLINAS —
**CREDIT UNION
FOUNDATION**



Frankie DeDonato
PFP Services
Advisory Council Chair

Let us continue to work together to
enrich the lives of children in the Carolinas

www.carolinasfoundation.org

