



CAROLINAS CREDIT UNION FOUNDATION

DEVELOPMENT ISSUES WORKSHOP SPEAKERS

9:10 – 9:45 AM

Workforce Readiness in Action: Creating Employment Opportunities

Speaker: Dr. Emily Jensen Wheeler, CEO, Dress for Success Charlotte

Bio: Dr. Emily Jensen Wheeler joined Dress for Success Charlotte in January 2024 as the CEO. In this role, Emily leads the strategy, operations, financial health, and innovation of the organization. At Dress for Success Charlotte, Emily understands that women are economic amplifiers in the community. By investing in women through career development programs, job readiness workshops, high-quality, no-cost clothing, and inspiring community events, Emily is passionate about removing barriers that stand in the way of women's economic opportunities. Emily was recently announced as a nominee for this year's 40 Over 40 Awards by *The Charlotte Ledger*.



9:50 – 10:50 AM

Financial Counseling as a Strategy: Advancing Financial Well-Being

Moderator: James Jeter, VP of Business and Community Development, Skyla Credit Union

Bio: At Skyla, James plays a pivotal role in advancing financial wellness and expanding access to resources through strategic partnerships, educational initiatives, and outreach programs. He leads efforts to strengthen member acquisition and engagement, overseeing the development of robust financial literacy platforms while equipping retail employees with training that ensures every member receives an exceptional, seamless experience. His leadership has been instrumental in aligning Skyla's mission with measurable community outcomes, addressing critical needs, and positioning the organization as a trusted partner in financial empowerment. James's influence extends far beyond his professional role. He currently serves as Board Chair of Habitat for Humanity York County, and Chair of the York County Regional Chamber of Commerce. In each of these roles, he brings a unique ability to unite diverse stakeholders, advance organizational strategy, and catalyze meaningful, sustainable change.



Panelist: Stacey Adams, Financial Education Manager, Founders FCU

Bio: Stacey Adams is a Certified Financial Counselor with over 12 years of experience serving members through the credit union movement. She holds an Associate in Science from USC Lancaster and a Bachelor of Arts from the University of South Carolina, with a focus in secondary education. Throughout her career, Stacey has worked closely with diverse communities, empowering individuals and families to improve their financial well-being through education on budgeting, credit, and long-term financial planning. In addition to her professional work, Stacey is actively involved in her local community through various nonprofit organizations and boards. As a working mother of two, she brings both professional expertise and real-life perspective to her work, understanding the everyday challenges families face when managing their finances.



Panelist: Annie Goff, Financial Wellness Manager, Skyla CU

Bio: Annie Goff is the Financial Wellness Center Manager at Skyla Credit Union, where she founded and leads a free financial counseling program designed to help members build lasting financial stability. In addition to one-on-one counseling, Annie facilitates financial wellness workshops for members and employer partners through the Skyla @ Work program, bringing financial education directly into the communities and workplaces she serves. Drawing on her background in social work, Annie brings a person-centered approach to her work, integrating motivational interviewing and structured goal-setting into every interaction. Annie holds an MSW from Winthrop University and is a Licensed Master Social Worker (LMSW) and Certified Credit Union Financial Counselor (CCUFC). She believes that financial well-being is inseparable from overall wellness and is committed to making quality financial guidance accessible to every member her credit union serves.



Panelist: Chelsea Newton, Community Engagement Manager, Spero Financial FCU

Bio: Chelsea Newton, a proud Western Carolina University alumna, brings over 14 years of experience in the financial industry and a passion for making a difference to her role as Community Engagement Manager at Spero Financial. She leads dynamic initiatives that drive financial empowerment and strengthen community connections, with a focus on creating meaningful, measurable impact. As a Certified Credit Union Financial Counselor, Chelsea is committed to equipping individuals with the tools, confidence, and support they need to take control of their financial futures. Her passion for service extends beyond the workplace through active involvement with The Dream Center, New Foundations Home for Children, and Anderson Interfaith Ministries, where she continues to invest in the communities she serves. When she's not championing financial wellness, Chelsea enjoys exploring the outdoors through hiking and camping, and bringing people together through her love of cooking.



11:00 – 11:30 AM

A New Model for Financial Capability: Lessons from Common Wealth Charlotte

Speaker: Tashara Brown, CEO, Common Wealth

Bio: Tashara Brown is the CEO of Common Wealth Charlotte and a strategic leader who leads with heart, vision, and a deep commitment to economic mobility. With over a decade of experience driving organizational growth, building high-impact partnerships, and advancing community-centered solutions, she has led initiatives that connect people to opportunity and strengthen pathways to long-term stability. She holds an MBA from Walden University and a Bachelor's degree from Armstrong State University. Tashara's work lives at the intersection of people and systems; designing strategies that not only address immediate needs but also transform the structures that shape long-term outcomes. In addition to her leadership at Common Wealth Charlotte, Tashara brings experience in real estate, offering a practical lens on wealth-building and access to opportunity. She is also a proud U.S. Army veteran and an active community leader, having served on multiple boards and advisory committees across the Charlotte region.



11:35 AM – 12:00 PM

From Challenges to Change: Addressing Development Issues Through Credit Union Action

Speaker: Lauren Whaley, President, Carolinas Credit Union Foundation

Bio: Lauren Whaley has spent nearly 22 years in the credit union movement and has served as President of the Carolinas Credit Union Foundation since late 2015, previously serving as Vice President of Governmental Affairs at the Carolinas Credit Union League. During her nearly 8 years at the League, Lauren advocated for credit union interests and helped launch a young professionals networking group, now CUxEL. Her credit union career began in the marketing and public relations department at Truiliant Federal Credit Union following her graduation from NC State University. In her current role, Lauren has grown the Foundation's impact as a philanthropic partner to credit unions, business partners, and Chapters across the Carolinas. She was elected to the National Credit Union Foundation Board in January 2025 to represent the State Credit Union Foundation Network. Lauren holds the Credit Union Development Educator (CUDE) designation and was recognized with the Eugene H. Farley League Leadership Award in 2023 by the American Association of Credit Union Leagues. She is involved with numerous non-profit organizations in her hometown of Salisbury, NC where she currently resides.



12:50 – 1:50 PM

The ALICE Experience: A Real-World Look at Financial Survival & the Role of 211.

Speaker: Sally Gordon, Director of Mission Advancement, United Way of North Carolina

Bio: Sally is an experienced nonprofit professional who joined United Way of North Carolina in January 2025, bringing a wealth of experience from United Way of Alamance County, where she spent five years advancing through roles from Community Impact Coordinator to Director of Mission Advancement. In her current role, Sally oversees member services for Local United Ways across the state, leads policy and advocacy work, and drives strategic fund development. She holds a Master's in Healthcare Administration and a Bachelor's in Public Health, and is passionate about equipping individuals and families with the tools they need to thrive. In her spare time, Sally enjoys exploring walking trails in Cary with her black lab mix, Harper, along with a good book and a great cup of coffee!



2:00 – 2:30 PM

Purpose in Action: Expanding Access Through Advocacy and Community Commitment

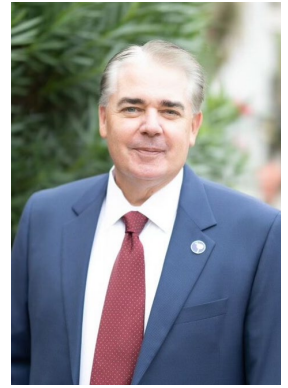
Speaker: Billy Boylston, Chief Advocacy Officer, Carolinas Credit Union League

Bio: Billy Boylston serves as Chief Advocacy Officer for the Carolinas Credit Union League, leading its comprehensive advocacy vision and long-term strategy. Since joining the League in 2013, Billy has been a driving force in advancing state and federal priorities for credit unions across the Carolinas. He oversees legislative, regulatory, grassroots, and public-facing advocacy efforts in both North and South Carolina, strengthening relationships with lawmakers and expanding credit union influence at both state capitols and in Washington, D.C. Under his leadership, CCUL has grown political giving, increased credit union engagement in the electoral process, and built out a stronger advocacy team with dedicated state and federal roles. At the national level, Billy contributes to shaping credit union advocacy priorities through his work on the American Association of Credit Union Leagues (AACUL) Legislative Strategy Work Group and America's Credit Unions Advocacy Policy Committee.



Speaker: Robert Dozier, CEO, Palmetto Citizens FCU

Bio: Robert Dozier is president and CEO of Palmetto Citizens Federal Credit Union, a \$1.4 billion financial institution serving the Midlands since 1936. A Columbia native and University of South Carolina graduate, he has over 35 years of experience in financial services and mortgage banking. Appointed by the Bush Administration, Dozier served as director, vice chairman, and chairman of the Federal Home Loan Bank of Atlanta, a \$155 billion wholesale bank serving more than 850 institutions. He later became the bank's executive vice president and chief business officer, leading key strategic and business initiatives for nearly a decade. Dozier was elected to the Richland School District 2 Board at age 20, serving as chairman, and has served on the boards of USC, Midlands Technical College, Palmetto Health Foundation, and the Greater Columbia Chamber of Commerce.



2:35 – 3:05 PM

Housing & Homelessness: A Community Perspective

Speaker: Liz Clasen-Kelly, CEO, Roof Above

Bio: Liz Clasen-Kelly serves as the CEO of Roof Above, NC's most comprehensive homeless services provider. Under her leadership, Roof Above has grown to ten campuses, including significantly expanding its supportive housing footprint through innovative solutions and a low-barrier approach. Liz has spent nearly thirty years in the work from front-lines outreach to community-level advocacy for our most vulnerable neighbors. She is a graduate of Davidson College and received her Master of Public Policy from Duke University. Liz is a proud member of a blended family, with four kids ranging from 12 to 28.

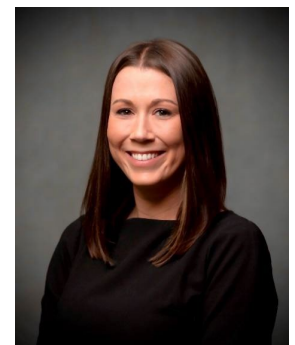


3:10 – 3:45 PM

Collaborative Solutions: Advancing Housing Affordability

Speaker: Caitlin Duke, VP-Associate Director of Grants, SECU Foundation

Bio: With over a decade of experience at State Employees' Credit Union, Caitlin Duke brings a strong background in financial services, including mortgage lending, investments, insurance, and advisory solutions. Transitioning to the Foundation in 2022, Caitlin began her work vetting grant applications and high-impact funding requests supporting communities across North Carolina. Over the past four years, she has grown into a leadership role and now serves as the VP-Associate Director of Grants for SECU Foundation, where she manages a team of grant officers and helps guide strategic philanthropic investments statewide. Caitlin grew up in Fayetteville, North Carolina and received her degree in Psychology from East Carolina University and holds a Certificate in Nonprofit Management from Duke University.



Speaker: Becca Mulvaney, Senior Engagement Officer, SECU Foundation

Bio: Becca is an Engagement Officer with SECU Foundation, supporting outreach and engagement activities across North Carolina. Becca's background is primarily in higher education and prior to the Foundation she held roles at UNC-Chapel Hill in service-learning and at Lynn University in South Florida in leadership development and service. Becca has a B.A. from Elon University and an M.Ed. from North Carolina State University. She lives in Raleigh, NC with her husband, dog and cat.

