

# Credit Union Advisory Council



Consumer Financial  
Protection Bureau

**Chairperson, Rose Bartolomucci** currently serves as President and CEO of the Towpath Credit Union in Kent, OH. Previously, Ms. Bartolomucci was Deputy Superintendent for Credit Unions, working as the chief regulator for 200 state-chartered Credit Unions in the Ohio Department of Commerce, Division of Financial Institutions for the Credit Union Section.

**Vicechairperson, Kevin Foster-Keddie** currently serves as President and CEO of Washington State Employees Credit Union in Olympia, WA. The Credit Union serves over 170,000 members through eighteen retail offices. Mr. Foster-Keddie has been CEO of a number of prominent credit unions during his career, including credit unions serving the employees of Farmers Insurance, Xerox, IBM, American Express, and Direct TV.

**John Buckley** currently serves as President and CEO of Gerber FCU, a multi-SEG Federal Credit Union located in Fremont, MI. Mr. Buckley was a commercial lender and community bank president for 22 years before joining Gerber in his current capacity in the fall of 2006. Mr. Buckley is a former President of the Fremont Rotary Club, Treasurer of the Holton (MI) School Board, Board Member of the United Way of the Lakeshore, Board Member of Spectrum Health Gerber Memorial Hospital and Secretary-Treasurer for the Michigan Credit Union League.

**Ron Ehrenreich** currently serves as CEO and co-founder of Syracuse Cooperative Federal Credit Union (d.b.a. Cooperative Federal), a high-impact Community Development Financial Institution (CDFI) serving the urban core of Syracuse, NY. With credit union experience dating back to 1982, he is responsible for financial management, strategic planning, policy development, and executive oversight. Mr. Ehrenreich is active in many facets of public life and serves on the CUNA Consumer Protection Subcommittee. He served for ten years as President of the CNY Chapter of the Credit Union Association of NY until stepping down in 2013.

**Robert Falk** is the president and CEO of the Purdue Federal Credit Union. Purdue Federal serves the financial needs of over 60,000 members worldwide and holds over \$825 million in assets. Prior to joining Purdue Federal Credit Union in 2002, Bob held leadership positions with Elevations CU and CUNA Mutual Group. Bob is also very involved in several credit union industry organizations including the Filene Research Council, CUNA and the Indiana Credit Union League. Involvement in the community he serves is also very important as he holds leadership positions with local community organizations including the United Way, Greater Lafayette Commerce, Purdue University, Junior Achievement, and the NCAA/Purdue Athletics Affairs Committee.

**Mitchell Klein** currently serves as Chief Risk Officer for Citadel Federal Credit Union, based in Exton, PA. He has been with Citadel Federal Credit Union since 1989. Prior to joining the Citadel Federal Credit Union, Mr. Klein was General Counsel and Senior Vice President of the Police and Fire Federal Credit Union in Philadelphia, PA.

**Jason Lee** currently serves as EVP / CFO for Orion Federal Credit Union. Orion is \$550 million in assets with over 55,000 members and 9 branch locations serving the Memphis metropolitan area. Prior to joining Orion in late 2010, he was the EVP and then the President and CEO of TexasOne Community Credit Union in Houston, TX for over 6 years. Additionally, prior to working in credit unions he served as a State of Texas senior credit union examiner.

**Lily Lo** is the CEO of Northeast Community Federal Credit Union (NECFCU) in San Francisco, CA. She oversees the Community Development Financial Institution certified credit union's three branches, which are located in low-income, economically challenged communities. Lily expanded

services offered by the credit union to include micro-loans, free tax filing for low income taxpayers in partnership with the VITA Program and free monthly financial literacy workshops on “How to Budget and Save’ and ‘How to Manage Your Credit’. Ms. Lo has dedicated her 25-year credit union career to this underserved population.

**Robin Loftus** is the Chief Operating Officer of Heartland Credit Union in Springfield, Illinois, a credit union which is \$240 million in assets. Prior to joining Heartland, Robin was Executive V.P./ Chief Operating Officer of Security Bank in Springfield, Illinois, a \$150 million Mutual Savings Bank. Robin also held positions of 1<sup>st</sup> VP of Mortgage Lending for First of America Mortgage Company and 1<sup>st</sup> VP of Retail Banking for Germania Bank, an \$800 million Savings and Loan.

**James McDaniel** currently serves as the President/CEO of Heritage Trust Federal Credit Union in Charleston, SC which has \$484 million in assets and serves 44,000 members. Previously he was the President/CEO of Carolina Trust Federal Credit Union from 1996 to 2005 where in 2004 he was chosen by the National Association of Federal Credit Unions as its ‘Professional of the Year’ for that asset category. He started his credit union career in 1988 at Heritage Trust FCU where he held numerous senior management positions until 1996. Mr. McDaniel currently serves on the Board of Directors for the First Carolina Corporate Credit Union, the Greater Summerville/Dorchester Chamber of Commerce, and The Citadel Alumni Association where he is a Life Member and its current Treasurer. He is an active member of the Joint Base Charleston Advisory Council and the Charleston Southern University Board of Visitors.

**Robin Romano** currently serves as Chief Operating Officer of MariSol Federal Credit Union, a CDFI in Phoenix Arizona. She has been at MFCU for over 15 years. Previously Ms. Romano served as a Principal Examiner for NCUA for over 7 years. Prior to NCUA was the Loan Manager for Western Horizons Federal Credit Union in Mesa, Az. In addition to over 25 years in the Credit Union movement, Ms. Romano has worked in the banking and real estate industry. Ms. Romano also currently serves as a Board member of the Federation of Community Development Credit Unions.

**Marcus Schaefer** has served as President and CEO of Truiliant Federal Credit Union since 1995. Mr. Schaefer currently serves on the Winston-Salem Chamber of Commerce Board of Directors, where he also serves on the President’s Advisory Council and was the 2013 Chairman. He is also on the board of The Center for International Understanding (CIU) at The University of North Carolina and Winston-Salem Business, Inc. In addition, he is an active member of the Carolinas Credit Union League Governmental Affairs Committee. Mr. Schaefer is a former member of the NAFCU Board and Executive Committee and has served on numerous board's and advisory councils in Winston-Salem and throughout the Piedmont Triad area.

**Ronald Scott** is currently the President/CEO of Appalachian Community Federal CU since 2010. Mr. Scott has 18 years of experience in Credit Union management. He currently serves on the TN Credit Union League Board of Directors as well as the Washington County Economic Development Council in TN. Previously, Mr. Scott served as a board member of the following on the boards of the Bay Area American Red Cross, Marcus A. Foster Educational Institute and was a member of Government Relations & Education Committees-San Mateo Chamber Commerce. Appointments held include: 2010 California/Nevada Credit Union League Government Relations Committee, 2008 Congresswoman Speier’s Finance Services Advisory Comm.

**David Seely** has served as President and CEO of Kirtland Federal Credit Union, Albuquerque, New Mexico since 1990. His industry and community activities include serving as chairman of CU

Anytime, LLC and CU ATM Services, LLC, and on the boards of Kirtland Partnership Committee, the Greater Albuquerque Chamber of Commerce, United Way of Central New Mexico, DataPrint Services, LLC as well as the Association for Commerce and Industry, and as the past president of the Rotary Club of Albuquerque del Sol.

**Helen Godfrey Smith** currently serves as President and CEO of Shreveport Federal Credit Union, where she has served since 1983. She has grown the financial institution from less than 2-million in assets to over \$100-million today. Under the guidance of Mrs. Smith, Shreveport Federal is a Community Development Financial Institution that serves 22,000 members. Mrs. Smith sits on the boards of: the Fiest-Weiller Cancer Center, Vivian Louisiana Citizen Advisory Council, the North Caddo Hospital Foundation Board, and the Shreveport Chamber of Commerce, where she is Chair of the Business Development Council.

**John Bernie Winne** Bernie Winne has been the President and CEO of the Boston Firefighters Credit Union since 2002. Prior to that he served as the Executive V.P. of Members Plus Credit Union for 12 years. He is a director and past Chairman of the Board of the Massachusetts Credit Union League and a member of the CUNA Government Affairs Committee. He has been employed in the credit union industry for more than 30 years.