



Scholarships

Financial Literacy

Disaster Funding



Wisconsin Credit Union
FOUNDATION

Inc.

2015 Annual Report

Grants

TheLeague.coop/Foundation
(262) 549-0200 • (800) 242-0833

our message



...is a strategy by which individuals, communities and economies grow stronger through credit unions' influence on their financial wellness. The Wisconsin Credit Union Foundation plays a key role in driving this effort.

By improving financial literacy, promoting credit union development, educating credit union staff and volunteers and re-investing in the credit union system, The Foundation is indeed a powerful force for good.

Since The Foundation was founded in 2007, nearly \$1 million has been given to credit unions and their communities. What an impressive force for good! This has been achievable only because of each member of our Annual Donor Fund Society – thank you!

Gratefully,

Carol Adler, Chair

your board



Catherine Tierney, Vice Chair
Community First Credit Union

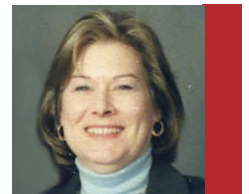


Debra Woods, Secretary
Taylor Credit Union

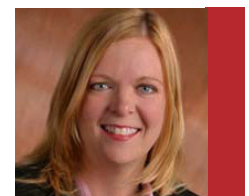


Kevin Hauser, Treasurer
Westby Co-op Credit Union

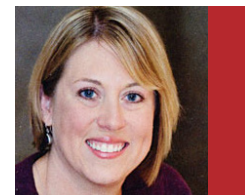
Carol Adler, Chair
Marshfield Medical Center Credit Union



Kim Youngblood, Director
FOCUS Credit Union



Jennifer Schilling, Director
Empower Credit Union



Brett Thompson, Director
The League



Our Mission

The Wisconsin Credit Union Foundation is a 501(c)(3), non-profit organization that promotes the growth and health of credit unions and their communities.

Our mission is to:

- Improve financial literacy across Wisconsin
- Promote credit union development through innovative REAL Solutions®
- Educate credit union staff and volunteers
- Support the credit union system in times of need

Since its inception in 2007, The Foundation has given out:

- \$38,000 in scholarships to 23 people
- \$82,500 in grants to 24 credit unions
- \$781,829 in financial literacy initiatives
- \$13,500 in credit union disaster support

Nearly \$1 million going directly back to the credit union system and Wisconsin communities!!!

Working together we can achieve so much.

financial literacy

brass|Student Program

This personal finance classroom resource was provided free to any Wisconsin public high school that requested it. This program features a lifestyle money magazine, video lesson plans and online resources for teachers and students that support state teaching standards. The program was honored with the state's top financial literacy award.



In 2015
388 teachers from
292 schools

promote credit union development

REAL Solutions® Initiative Grants

Grants support credit unions' efforts to help people of all ages and incomes:

- **Save** money and establish financial goals
- **Improve** their creditworthiness
- **Increase** their financial savvy
- **Build** wealth

Hands-on Financial Education

STAR Credit Union in Madison received a grant to hire additional student tellers and present a negotiating opportunity to students seeking higher salaries for their service to young savers at the Boys & Girls Club. The young tellers create a budget for the income they earn, learn cash-handling and time management skills, balance a cash drawer and benefit from career coaching. Because the in-club savings program makes no income from fees or loan interest, the grant helped to reward long-term employees and bring new student learners on board.



Credit Union Development Grant

This grant helps fund the technology and operations-related expenses that measurably assist the credit union in serving members.

Security Upgrade

Oshkosh Truck Credit Union received a grant to cover EMV upgrade costs, which improves data security for debit card transactions and reduces the potential for fraud.

Oshkosh Truck **Credit Union**

Technology Updates

Tri-County Credit Union received a grant to help purchase a check scanner, computer, monitor, printers and receipt printers, resolving check printing errors and confusing receipts for members.

TRI-COUNTY
credit union

educate credit union staff & volunteers

Professional Development Scholarships

These scholarships ensure that limited training budgets don't limit a credit union's potential to serve members. Scholarships are awarded on the basis of need, the impact of the program on the credit union and the applicant's involvement in and commitment to the movement.

2015 CUNA Management School Scholarship Recipients



"Many of the concepts I learned have helped me through the transition from Compliance Officer to President. The experience has prepared me to lead my credit union to a strong future as a competitive small credit union."

Nicole Christiansen-Zabler

Racine Municipal Employees Credit Union

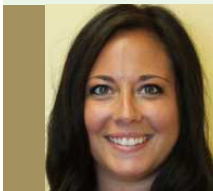


"The program has helped me grow in my position from all angles. The courses challenge your thoughts and habits to become a better leader and the projects and presentation put your learning to the test. The people I met I know I can always reach out to with any problem. It has been one of the best experiences of my career."

Amanda Ferwerda

Dane County Credit Union

2015 Young Professional Development Scholarship Recipient

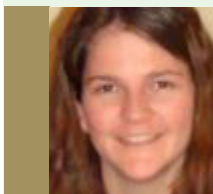


"[CUNA's Regulatory Compliance School] covered all aspects of credit union compliance from deposits, consumer lending, NCUA regulations and requirements, mortgage lending, to operations. I have made life-long friends and gained a wealth of knowledge from our industry's top leaders in compliance. I can't wait to develop a comprehensive compliance training program...."

Janelle Woggon

Governmental Employees Credit Union Credit Union

2015 Development Education Scholarship Recipient



"[The DE Program* helps recipients] continue credit unions' social responsibility to our community and be an advocate for credit unions locally and beyond."

Katie Karls

Premier Financial Credit Union



support the credit union system

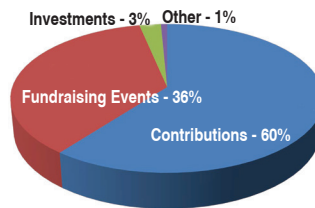
Emergency Relief Grants

These funds help credit unions affected by a natural disaster assist their members and communities. The grants reach affected areas with assistance from the National Credit Union Foundation and the World Council of Credit Unions.

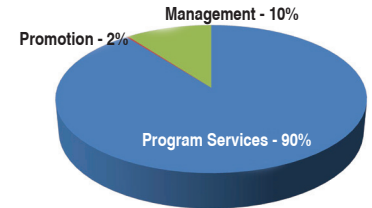
\$500 was disbursed to the World Council of Credit Unions (WOCCU) for Nepal Earthquake Relief efforts.

financial summary

The Foundation had a total revenue of \$97,200 in 2015. Total expenses were \$54,252. Through careful management and generous contributions, the Foundation was able to fulfill its mission to serve credit unions through three grants, four scholarships and funding of the Brass Student Program.



2015 Revenue



2015 Expenses

founders circle

A special thank you to all of our initial supporters who make up the Founder's Circle.

Edward A. Filene

Capital Credit Union | Connexus Credit Union | Corporate Central Credit Union | Focus Credit Union
Fox Communities Credit Union | Lakeview Credit Union | Summit Credit Union
J. David & Gretchen Christenson | Michael DeGrand | In Memoriam of Jim Goebel
Ralph & Mary Lou La Macchia | In Memoriam of Lee Rogers | Brett Thompson | Jo Whiting
The Wisconsin Credit Union League | W.C.U.L. Services Corp. | WISCUB Inc.

Roy F. Bergengren

Avestar Credit Union | Central City Credit Union | Co-op Credit Union
Marshfield Medical Center Credit Union | Members First Credit Union | Neenah Foundry Credit Union
P.C.M. Employees Credit Union | WESTconsin Credit Union | Cathy & Dan Becks | Kenneth Beine
Mary and Scott Bliss | Chris Butler | Jim Drogue | John & Debra Engel | Jay & Leslie Fahl
Kevin & Shari Hauser | Greg Lentz | Mike Mallow | Jennifer Schilling | Jill Weber

Charles G. Hyland

Blackhawk Community Credit Union | Bull's Eye Credit Union | Co-operative Credit Union
County-City Credit Union | Empower Credit Union | Enterprise Credit Union
First Community Credit Union of Beloit | Fond du Lac Credit Union | Fort Community Credit Union
Marathon County Employees Credit Union | N.E.W. Credit Union | Post Office Credit Union
Sheboygan Area Credit Union | Shoreline Credit Union | Taylor Credit Union
University of Wisconsin Credit Union | Carol Adler | Lora Benrud | Robert Carmichael | Dennis Degenhardt
Ron Eide | Tom Knabel | Paul Kundert | Tom Liebe | Patrick Lowney | Dave Petit | Tom Pinnow | Lori Pook
Karen Raether | Carol Robinson | Jim Schrimpf | Mary Schultz | Michele & Ed Spanbauer | Judy Stoikes
Jerry Tiedt | Bonnie Timm | Sharon Tome | Les Van Ornum | Carla Watson | Cliff Williams | Sue Winters
Dan Wollin | Kevin Yaeger | Kimberly Youngblood

additional donors

A M Community Credit Union | CitizensFirst Credit Union | Evergreen Credit Union
La Crosse Area Postal Credit Union | Madison Area Chapter of Credit Unions
Northwestern Mutual Credit Union | St. Mary's & Affiliates Credit Union | Valley Communities Credit Union



2015 annual fund donor society

philanthropists

Credit unions donating over \$5,000, credit union partners donating over \$2,500 and individuals donating over \$500.

PCM Credit Union | Madison Area Chapter of Credit Unions | David Hall | Bill Rockeman | Brett Thompson

patrons

Credit unions donating \$2,500-\$4,999, credit union partners donating \$1,000-\$2,499 and individuals donating \$300-\$499.

Mary Bliss | John Engel | Cari Thompson | Tammy Williams | Dan Wollin

partners

Credit unions donating \$1,000-\$2,499, credit union partners donating \$500-\$999, and individuals donating \$200-\$299.

Central City Credit Union | Cloverbelt Community Credit Union | Heartland Credit Union | Unison Credit Union
University of Wisconsin Credit Union | Verve, a Credit Union | Community Business Lenders
Dennis Degenhardt | Kevin Hauser | Julie Jennerjohn | Tom Liebe

supporters

Credit unions donating \$500-\$999, credit union partners donating \$300-\$499 and individuals donating \$100-\$199.

Altra Federal Credit Union | CoVantage Credit Union | Fond du Lac Credit Union
Fox Communities Credit Union | Horizon Community Credit Union | Northwoods Community Credit Union
Sentry Credit Union | Taylor Credit Union | Valley Communities Credit Union | Westby Co-op Credit Union
Central Wisconsin Chapter of Credit Unions | June Buskel | Linda Hale | Phillip Hellmuth | Kim Hoppe
Pat Lowney | Karen Raether | Josh Roberts | Sarah Waincott | Nikki Wollmer | James Wookey

friends

Credit unions donating \$100-\$499, credit union partners donating \$100-\$299 and individuals donating \$50-\$99.

Badger-Globe Credit Union | Bay Shore Credit Union | Brantwood Credit Union
Hayward Community Credit Union | Indianhead Credit Union | Premier Financial Credit Union
Ripco Credit Union | Tomah Area Credit Union | Lisa Alery | Laura Desterhoft | Jennifer Esser
Paul Guttormsson | Angela Klaves | Robert Rynning | Lynn Schaufenbuel | Mary Wichman

donors

Credit unions donating less than \$100, credit union partners donating less than \$100 and individuals donating less than \$50.

Lakewood Credit Union | N.E.W. Credit Union | Jeff Bonk | Cathy Bosch | Nan Dorwaldt | Al Halverson
Chris Henzig | Tara Krejcarek | Wade Kutchera | Katie Liedtke | Ben Schweder



how you can help our mission

annual fund donor society

Make a personal or corporate gift and be part of our Annual Fund Donor Society.

fundraisers

Throughout the year we have a number of fundraising opportunities such as:

- Ca\$h Calendar raffle in December
- Bucket raffle during The League's annual convention
- The League Invitational Golf Outing in the Fall

memorials & tributes

What better way to connect the "People Helping People" philosophy to your colleagues and friends than through a gift to the charitable organization dedicated to helping Wisconsin credit unions help others.

community investment fund (CIF)

The CIF is an investment vehicle allowing credit unions to support the National Credit Union Foundation and state foundations, including ours in Wisconsin. The CIF provides almost two-thirds of the funding for key programs benefiting credit unions, their members and the communities they serve.

Credit unions investing in the CIF receive 50% of the dividend of their investment. The remaining 50% is shared equally between the state and national credit union foundations.

apply for a grant or scholarship, use financial ed resources

Remember to take advantage of the scholarships and grants available to you and your credit union. Also make sure that your financial education program is using The Foundation's resources to help make it a success. These resources are here for you.

spread the word

We rely on fundraising efforts from credit unions on behalf of The Foundation. If you're holding an event or activity, please consider having a portion of the proceeds benefit The Foundation. Some ideas are:

- Casual day at work
- Bake sale
- Car wash

If someone you know could benefit from The Foundation's services, please urge them to get in touch.

contact us for more information or how to get involved

(800) 242-0833 | TheLeague.coop/Foundation





*thank you
for working together to achieve so much*



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