

JUNE 2024

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## Officer Elections

At Energize Credit Union's March Board Meeting a new slate of officers were elected. Michelle Phelps from Central Electric Cooperative in Stillwater was elected to serve as President, Shane Bowers from Cotton Electric Cooperative in Walters was elected to serve as Vice President, Chris Meyers from OAEC in OKC was elected to serve as Treasurer, and Jennifer Swift from Pioneer in Kingfisher was elected to serve as Secretary.

***Congratulations to our newly elected officers!***



Pictured from left to right: Michelle Phelps, Shane Bowers, Jennifer Swift, and Chris Meyers

### FEATURED RATES - SAVING

| Type    | Rate  | APY   | Min     |
|---------|-------|-------|---------|
| Savings | 0.40% | 0.40% | \$5     |
| CD 6    | 4.50% | 4.58% | \$1,000 |
| CD12    | 5.00% | 5.10% | \$1,000 |
| CD24    | 4.25% | 4.32% | \$1,000 |
| CD36    | 4.00% | 4.06% | \$1,000 |
| IRA     | 4.25% | 4.32% | \$0     |

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## Getting to Know...

### Cami Landrith

#### What do you do for Energize?

I am the Member Service Representative. I am really enjoying my position.

#### Who makes up your family and where do you live or grow up?

My husband and our four children. I was born and lived in Montana until I was a freshman in high school, at that time I moved to Norman, OK.

#### Are you a dog person or a cat person (or neither)?

A dog person, we have 4 golden doodles that rule the house.

#### Are you an early bird or a night owl?

I am neither—I love the opportunity to sleep in on the weekends if able.

#### Which season is your favorite?

Spring, I love watching the trees turn back to green.



## Dailey & Krueger Earn Certification



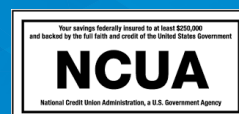
Lisa Dailey and Emma Krueger recently earned their Certified Banking Security Manager (CBSM) credentials through the SBS Institute.

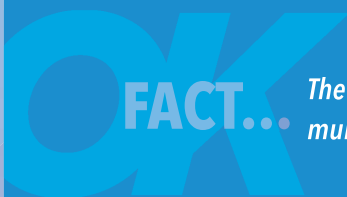
The SBS Institute is uniquely designed to serve the banking industry by providing industry-specific cyber education. Their certifications prepare financial institution professionals to address cybersecurity threats and regulations. Dailey and Krueger join an elite group of financial service professionals who have demonstrated their commitment to strong cybersecurity practices by earning this cyber-specific certification.

The CBSM designation acknowledges licensed professionals who have demonstrated their experience and proficiency in implementing and managing an information security program. It has at its foundation internationally applicable standards of practice, knowledge, and ethics, differentiating licensed professionals who have taken the steps necessary to become certified. The CBSM syllabus includes a series of lectures, assignments, and a final exam covering the subjects of security and technology trends, laws and regulations, information security programs, risk assessments, operationalizing security, and audits.



**5-STAR ENERGIZE CREDIT UNION**  
**WHERE MEMBERS MAKE GREAT OWNERS**





The Pensacola Dam on Grand Lake is the longest multi-arched dam in the world at 6,565 feet.



## Out & About

**WE LOVE COOPERATIVE VISITS.** This past quarter Energize staff members were welcomed by Canadian Valley and Southwest Rural Electric Cooperative as well as KAMO. Thanks for letting us visit your Coop! Energize also had the opportunity to participate in OAEC's Annual Meeting and OAEC's Legislative Day at the Capitol as well as the Oklahoma City Memorial Marathon.



## Credit Union Compliance Expert (CUCE)



Energize Credit Union (ECU) is delighted to share that Lisa Dailey, has recently completed the necessary studies and testing to become a Credit Union Compliance Expert (CUCE).

The CUCE designation was created by Credit Union National Association (CUNA) to help credit union compliance professionals gain and maintain a comprehensive understanding of the current regulatory environment for credit unions. Dailey's certification fortifies ECU's ability to navigate the intricate landscape of federal financial regulations.

To attain this designation, Dailey successfully completed the CUNA Regulatory Compliance Certification eSchool coursework and passed an exam in each of the following critical compliance areas: NCUA Requirements and Guidance, Deposit Account Regulations, General Operations Regulations, Consumer Lending Regulations, and Mortgage Lending Regulations. To maintain her designation, Dailey is required to undergo recertification every three years, ensuring that her compliance knowledge remains current.

Dailey's certification underscores ECU's commitment to providing its members with the highest level of financial services while adhering to strict compliance standards and regulatory complexities.

## Energize Credit Union Partners with GreenPath Financial Wellness to Offer Financial Counseling to Individuals and Families

- Energize Credit Union is partnering with GreenPath Financial Wellness, a leading national nonprofit organization in service for more than sixty years, to provide access to free, one-on-one financial counseling, debt management services and financial education resources.

- Through the partnership, GreenPath counselors will assess an individual or family's entire financial picture and identify options that make it easier to plan for a financially healthy future. Caring, certified experts deliver debt counseling to help people manage credit card debt and other consumer debt. GreenPath's housing counseling includes foreclosure prevention services, home buyer preparation assistance, renter and reverse mortgage counseling. GreenPath counselors also provide student loan counseling.

- "Those we serve who might be concerned about their financial picture are now in a better position to make informed decisions for a bright financial future," said Lisa Dailey. "Whether it's credit card debt, unexpected loss of income or meeting housing payments, it's important to remember you're not alone. GreenPath's financial counseling is free, confidential, and designed to help ease financial stress."

- "The Energize Credit Union family now has access to caring, judgement-free counseling that strengthens financial wellness at every step of the financial journey," said Kristen Holt, President and CEO, GreenPath Financial Wellness. "As a national nonprofit in service for nearly 60 years, GreenPath is ready to help those seeking guidance through our team of HUD Certified Housing Counselors and NFCC certified credit counselors."



To access this resource, **visit our website at [www.energize.coop](http://www.energize.coop)** under the financial literacy tab **or call GreenPath at 877-337-3399.**

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