

# 2019

ANNUAL REPORT

# A YEAR OF IMPACT



IOWA CREDIT UNION  
FOUNDATION



ICUF PROVIDED MISSION CRITICAL PROGRAMS FOR IOWA CREDIT UNIONS AND THEIR MEMBERS.

## Financial Coach Training Program

39 staff from 22 Iowa credit unions graduated from the first ever 'People Helping People' Financial Coach Training Program in 2019

## Community Impact Roundtable

40 attendees gained resources and best practices on growing community impact

## Warren A. Morrow Memorial Scholarships

400 applications from credit union members, 20 volunteers selected 12 scholarship winners

\$100,000 AWARDED IN CRITICAL GRANTS TO IOWA CREDIT UNIONS AND THEIR MEMBERS.

**\$37,000**

awarded to Iowa credit union members in scholarships and emergency disaster relief aid



**76**

Iowa credit union members were awarded more than \$57,000 in matched savings



**+\$17,000**

awarded to Iowa credit unions for technology investments and strategic planning

ICUF CHAMPIONED THE PEOPLE HELPING PEOPLE PHILOSOPHY THROUGH INVESTMENTS & INITIATIVES.

## \$30,000 Investment in Financial Education

ICUF invested nearly \$30,000 in the curriculum and launch of the 2019 'People Helping People' Financial Coach Training Program to help credit unions provide financial coaching to members in need across the state

## \$8,500 Granted to Community Partners

including the Iowa Caregivers Association, Habitat for Humanity, the Iowa Coalition Against Domestic Violence, JumpStart, Money Smart Month and the Iowa Association of Community Action Agencies

### 2019 AUDITED FINANCIAL STATEMENT

**\$525,285**  
Assets

**\$8,226**  
Liabilities

**\$521,025**  
Revenue

**\$361,871**  
Expenses



To empower people and communities to achieve financial well-being by championing the credit union philosophy of “people helping people.”

THANK YOU TO THE CREDIT UNIONS, ORGANIZATIONS AND INDIVIDUALS WHO CONTRIBUTED \$100 OR MORE TO THE IOWA CREDIT UNION FOUNDATION IN 2019.

1st Gateway Credit Union  
5 Star Community Credit Union  
ACE Credit Union  
Advantage Credit Union  
Affiliates Management Company  
Affinity Credit Union  
Allen Hospital Personnel Credit Union  
Alliant Credit Union  
Allied Solutions LLC  
Amy & Murray Williams  
Amy Miller  
Andrea Dose  
Andy Hawkinson  
Angela Drury  
Ann McMillian  
Ascentra Credit Union  
Audrey Bartlett  
Bev Long  
Bob Hoefer  
CAPTRUST  
Catch21, Inc.  
Carrie Kompelien  
Casebine Community Credit Union  
CBMS  
Cedar Falls Community Credit Union  
CENT Credit Union  
Chicago Central and Commerce Credit Union  
Chip Murray  
Chris Haner  
Chuck Lampe  
CO-OP Financial Services  
Collin Olson  
Collins Community Credit Union  
Community 1st Credit Union  
Community Choice Credit Union  
Convergent Technologies  
Coopera  
Corey Skadburg  
Corporate Central Credit Union  
CU Direct  
CUNA Mutual Group  
Dale Owen  
Danielle Gratton  
Darron Dunn  
Dave Cale  
Deb Madison-Levi  
Denny Siemers  
Des Moines Metro Credit Union  
Dupaco Community Credit Union  
DuPont Employees Credit Union  
DuTrac Community Credit Union  
Emily Caropreso

Erin O'Hern  
Financial Plus Credit Union  
First Financial Servicing, LLC  
Fort Dodge Family Credit Union  
Gardiner + Company  
Gordon & Monica Fischer  
Gracie Brandsgard  
GreenState Credit Union  
Greg & Julie Hanshaw  
Guild Mortgage  
Helen Pearce  
IH Mississippi Valley Credit Union  
Iowa Credit Union League  
Iowa Heartland Credit Union  
Iowa Student Loan  
Jaimie Miller  
Jason Norton  
Jason Skemp  
Jeff & Kim Hayes  
Jeff & Missy Disterhoft  
Jennifer Adkisson  
Jennifer Naeve  
Jennifer Simmons  
Jenny Lorenz  
Jeremy Smith  
Jessica Maldonado  
Jim Anderson  
Jim Niederhauser  
Jodi Allen  
Joe Hearn  
John Cacciatore  
John Gonner  
Joni Welling  
Journey Credit Union  
Julie Willse  
Justin Hupfer  
Karen Brown  
Katherine & Jordan Hensley  
Katie Bradshaw  
Keith Mesch  
Kim Fekkether  
Kristin Aulwes  
La Macchia Group  
Lacy Carpenter  
LenderClose  
Lennox Employees Credit Union  
Linda Andry  
Linn Area Credit Union  
Liz Hodgson  
Marian Holmes  
Mark Boehm  
Matt Oakley  
Matthew Loesche

Members Community Credit Union  
MEMBERS1st Community Credit Union  
Meridian Credit Union  
Metco Credit Union  
Michelle Barker  
Midland Credit Union  
Midwest Community Credit Union  
Midwest Insurance Management Services  
Miriam De Dios Woodward  
Monte Berg  
N.W. Iowa Credit Union  
National Cooperative Bank  
North Iowa Community Credit Union  
North Star Community Credit Union  
North Western Employees Credit Union  
Pat & Cathy Jury  
Patrick Connealy  
Paul Kronlage  
Paula O'Rourke  
Peoples Credit Union  
PJ Wubbena  
PolicyWorks, LLC  
PolicyWorks Iowa  
Power Co-Op Employees Credit Union  
Premier Credit Union  
Quaker Oats Credit Union  
Rebecca Devries  
Rebecca Neades  
RIA Federal Credit Union  
River Community Credit Union  
River Valley Credit Union  
Robin Caddell  
RSM  
Scott Zahnle  
Serve Credit Union  
SHAZAM  
Sioux Valley Community Credit Union  
Single-Source Architects & Master Builders  
Stephanie Muehring  
Storey Kenworthy  
Tamara Wood  
Ted Galvin  
Telco Triad Community Credit Union  
Teresa Whitehead  
The Family Credit Union  
The Hub-Co Credit Union  
The Municipal Credit Union  
Town and Country Credit Union  
United Credit Union  
Veridian Credit Union  
Wes Mallgren  
Woody Perkins