

Callahan strategic planning and consulting services are grounded in 21 years of dedication to the credit union industry. Our consultants offer a broad view of the industry as well as concrete examples of successful strategies that have been proven by credit unions in the real world.

Meet the Callahan & Associates Facilitators



Chip Filson

President

Focus: Strategic Planning, Industry Trends, Leveraging the Cooperative Network

Recent speeches:

- Becoming the Charter of Choice for the 21st Century
- Are Credit Unions a Growth Industry?
- Credit Union Identity: "Bank-Lite" or Member- Owned



Jay Johnson

Executive Vice President

Focus: Financial Performance, Strategic Planning, Delivery Channel Management, Lending Strategies

Recent speeches:

- Credit Unions in 2006: Rational Exuberance?
- Credit Union Trends and Opportunities in the Mortgage Lending Market
- Measuring Value Returned to Members



Melanie El-Sabaawi

Executive Vice President, Callahan Financial Services

Focus: Investments & ALM, Financial Performance

Recent speeches:

- Best Practices of High-Performing Credit Unions
- The Future of Credit Unions: Intelligent Design or a Darwinian Process?
- Credit Union Opportunities in a Time of Transition



Brad Myers

Strategy & Business Development

Focus: Merger Strategies, Strategic Planning

Recent Speeches:

- Where Will Your Credit Union Be in 3-5 Years? Effective Strategic Planning Techniques
- Beyond Katrina: Rethinking Your Disaster Recovery Plan
- Making Your Merger Seamless and Successful



Joe James

Senior Industry Analyst

Focus: Auto Lending, Financial Performance

Recent Speeches:

- Effectively Cross-Selling to Indirect Members
- Challenges and Opportunities for Credit Unions
- Building a Referral Network in a Purchase



*A CU*Answers Trusted Partner*

Tom Geggel

Industry Analyst

Focus: Member Business Lending, Mortgage Lending, Financial Performance

Recent Speeches:

- Growing Your Business Lending Portfolio
- Lending Success Stories: Helping Members Unlock their HELOCs Potential
- Building a Referral Network in a Purchase Mortgage Market



For more information or to engage one of the Callahan Facilitators, please call **Sarah Apgar at (800) 446-7453 ext. 354** to discuss the unique needs of your organization.

Mary Royston

Marketing Manager

Focus: Member Growth Strategies, Reaching the Underserved, Community Charter Expansion

- Growing and Expanding Member Relationships in the Credit Union Industry
- Serving Those with Modest Means
- Expanding to a Community Charter: Key Success Factors



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Other Facilitators

Jon Jeffreys

AVP, Callahan Financial Services

Focus: Investments & ALM, Financial Performance

Recent Speeches:

- Maximizing investment portfolios
- Essential Elements of an Effective ALM / Investment Policy
- State of the Credit Union Industry

Mike Philbin

VP of Sales, Callahan Financial Services

Focus: Investments, ALM & Credit Union Trends

Recent Speeches:

- Benchmarking Investment Portfolio Returns
- Evaluating ALM Models
- Fundamentals of Core Deposit Analysis