

# Credit Union Advisory Council

Biographies



**Chair, Shawn Wolbert, CIA** is the President / Chief Executive Officer for GHS Federal Credit Union, in Binghamton, New York. Ms. Wolbert assumed her role at GHS FCU in 2021 to assist the credit union in reaching the underserved and unbanked populations of the three counties they serve in New York. Ms. Wolbert's financial services history spans over 20 years. In addition to working as the Chief Executive Officer of credit unions in New York, and previously Indiana, she was Chief Financial Officer for the Michigan Credit Union League and the League of Southeastern Credit Unions.

During her time with the Leagues, she managed League InfoSight, providing regulatory compliance products and PolicyPro to over 3,000 credit unions nationwide.

Ms. Wolbert was a featured speaker for Credit Union National Association (CUNA), focusing on regulatory compliance and

credit union operations.

Ms. Wolbert is dedicated to the success of her community. She volunteers her time to the United Way and is the Director of the Board for the Fenton Free Library and the Northeast American Cancer Society.

Ms. Wolbert holds an MBA from Spring Arbor University and BS from Western Michigan University.



**Sharon Grieger**, CCEP, CFE, CIA, CISA, CRMA, CUERME, MBA, MS is Chief Risk Officer at Vantage West Credit Union in Tucson, Arizona. Established in 1955, Vantage West is among the largest credit unions in Arizona, with \$2.7B in assets, serves more than 175,000 members and has 20 branches. Sharon is responsible for the effective governance of the company's risk programs. As the leader of the independent corporate risk function, she oversees all financial and non-financial risks, including cyber risk management.

Sharon is passionate about the credit union mission to serve the underserved and Vantage West's strong focus and support for diversity, equity and inclusion. Prioritizing products and services tailored for low to medium income earners and protecting the financially vulnerable is especially important to her.

Sharon has a Master of Science in Cybersecurity, from the University of Arizona, Master Business Administration from Texas Southern University and Bachelor of Arts in Accounting & Auditing from DePaul University. Prior to joining Vantage West Credit Union in 2018, Sharon held leadership roles at Walmart, Boeing, and PepsiCo where she led diverse teams focused on audit, risk management, and compliance.



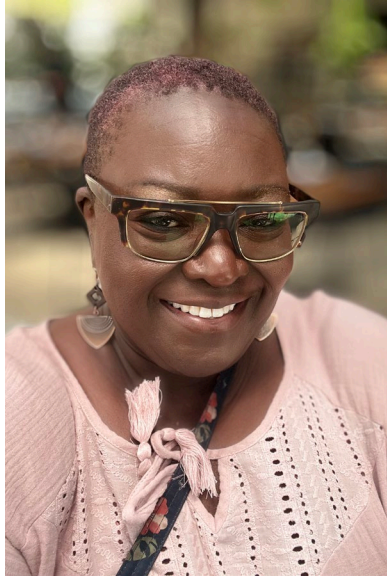
**Andrew C. Grimm** was named President/CEO of Apple Federal Credit Union in July 2017. Apple is a low-income designated credit union with over \$4.2 Billion in assets, 237,000 members, and 21 branches located throughout Northern Virginia. Andy is leading Apple's quest to improve the member experience and fill the growing void in prominent community financial institutions. Apple has proudly served the local education community since 1956.

During Andy's tenure as CEO, Apple has been widely recognized for improving the lives of numerous stakeholders. Helping the Community is deeply ingrained in Apple's culture. In conjunction with the Apple Federal Credit Union Education Foundation, they have given over \$10 million to education and community causes since 2006.

Their numerous initiatives dedicated to the education community have included multiple student branches, interest free new teacher transition loans, and the development of the Teacher Induction Program; a collaborative of local school systems dedicated to improving teacher retention. Apple has a robust community outreach plan that includes paid volunteer hours for staff, and long-time partnerships with local education systems and community non-profits.

Andy shares Apple's dedication to helping others. He is currently the Vice-President of the Education Credit Union Council and also serves on the Board of Directors for Leadership Fairfax. Past roles include a Board position with the Foundation for the Fairfax County Public schools, Fairfax Rotary Club participation, and numerous years spent as a mentor for disadvantaged elementary school students.

He has over 34 years of credit union experience. Andy is a Certified Public Accountant. He earned a Master of Science degree in Business from The Johns Hopkins University and a Bachelor of Science degree in Business from Fordham University.



**Kimberly Jones's** professional career has included expansive senior leadership roles in arts management, community development, and corporate philanthropy. Currently, as Director of Community Engagement-Midwest with Self-Help Federal Credit Union, Kimberly's responsibilities include helping individuals and institutions align their mission and values with their banking; leading a team that provides access to financial capability resources for the un/underbanked; overseeing strategic partnership and outreach activity in her region; and serving on credit union product development teams. In 2021, she helped lead the organization through a process to develop its first strength-based communication guide.

Kimberly has been a founding and active board member of mission-driven organizations that supported youth and community development. She currently serves on the board of Green America, where she serves on their JEDI (justice, equity, diversity, and inclusion) Committee. In addition, Kimberly has participated in fellowship programs where she explored the role of philanthropy through an equity lens in low to moderate income communities and examined issues of equitable access to lending capital for entrepreneurs of color.

She has served as a grant and award reviewer for organizations that championed organizational excellence, the creative arts, community development, and environmental sustainability. Kimberly holds a BA in Political Science from the University of Minnesota-Morris and an MA in Arts, Entertainment, and Media Management from Columbia College Chicago.



**Chad LaFlash** is the Associate Vice President of Research and Product Strategy for the University of Wisconsin (UW) Credit Union, based in Madison. UW Credit Union was founded in 1931 and serves 330,000 members with \$5 billion in assets today. Chad has worked there since 1987, starting as a Teller and holding roles in Deposit and EFT Services, Information Technology, Project Management, Marketing, and R&D.

In his time at UW Credit Union, he has been instrumental in guiding the organization through product design to become a market leader in checking accounts, digital services, auto and student lending, mortgages, and credit cards. Chad is passionate about delivering value to the membership, and has led efforts to reduce fees, embrace technology innovation, improve access for high school and college students, and design inclusive financial services for a diverse community.

Chad is a third-generation native of Madison and has volunteered on several non-profit community boards, in addition to his advisory work with credit union and banking associations at the local, state, and national levels. He holds certificates from the UW-Madison School of Business, and is a graduate of the Filene i3 program, NACHA Payments Institute, and CUNA Financial Management School.



**Suzanne Weinstein** has been a champion of the credit union movement for over 25 years. Serving as the President and CEO of Orlando Credit Union, she is passionate about the credit union's mission to build lifelong relationships with each member by empowering their financial momentum. Her focus is to build local community relationships and partner with organizations nationwide to provide additional avenues to empower financial momentum for all.

Suzanne's strategic vision has propelled her organization through membership changes, charter changes, real estate initiatives including affordable home ownership, adoption of a digital strategy with a cloud-first approach, and modernized transaction processing. In addition, she serves as a mentor to small credit unions. Her background as a CFO has provided a strong foundation to innovate and navigate competitive landscapes.

Suzanne currently serves on the CUNA CEO Executive Council as the Vice Chair, League of Southeastern Credit Unions (LSCU) Florida Advocacy Committee, Chair, LSCU Executive Councils Committee, Chair, Shared Services for Credit Unions Board, and the Orange County History Center, Past Treasurer. She is a CUNA CFO Executive Committee, Past Chair, former CUNA Housing Subcommittee member and former Filene Research Institute- izer.

A graduate of the University of Central Florida, MBA and BSBA Finance, she earned a Certificate in Certified Financial Planning, and graduated from the CUES Executive Program. The experience she treasures most is her volunteer work with Orange County Public Schools and the honor of receiving the Jefferson Award as a public-school mentor.