



**IOWA CREDIT UNION  
FOUNDATION**

## ICUF Announces Graduates of 2019 Financial Coach Program

May 16, 2019 (Des Moines, Iowa) – The Iowa Credit Union Foundation (ICUF) is proud to announce the graduates of our 2019 ‘People Helping People’ Financial Coach Program. Held May 7-9, 2019, in West Des Moines, 39 attendees from 22 different credit unions participated in three days of intense learning and simulation to help them grow in understanding of how a person’s relationship with money can impact their financial decision making and lead to potential hardship. Financial coaches are member advocates who can help credit union members navigate difficult financial situations.

“According to the 2018 United Ways of Iowa ALICE Report, Iowans are in the midst of a savings crisis,” said Jaimie Miller, Executive Director of ICUF. “We believe strongly that credit unions can have a greater impact on the communities they serve by providing needed financial coaching, helping members set financial goals and assist in determining the best way forward when situations seem dire.”

The curriculum for the ‘People Helping People’ Financial Coach Program was developed in partnership with Adam Carroll, founder of National Financial Educators. Attendees also received training in unconscious bias from Claudia Schabel, founder and president of Schabel Solutions.

“In developing this training program, we focused not only on how to be a financial coach, but also why financial coaches are needed,” said Carroll. “Financial habits are something that are developed over time and are as unique as the individual. Learning how to have meaningful financial discussions with members and how to uncover potential issues that may be leading to hardship can have a great impact on the services that a credit union is able to provide.”

The graduates of the 2019 ICUF ‘People Helping People’ Financial Coach Program are:

Jodi Allen, Iowa Credit Union League  
Jennifer Alstott, Fort Dodge Family Credit Union  
Ellen Andrews, DuTrac Community Credit Union  
Mandy Beckman, Peoples Credit Union  
Samantha Bierman, Members Community Credit Union  
Abbie Cross, Financial Plus Credit Union  
Kari Dake, Financial Plus Credit Union  
Jean Ditter, Gas and Electric Employees Credit Union  
Ryan Francis, North Star Community Credit Union  
Jose Garcia, Des Moines Metro Credit Union  
Greta Hart, First Federal Credit Union  
Jeffrey Hayes, North Star Community Credit Union  
Lisa Heath, First Class Community Credit Union



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Jeff Holschuh, Advantage Credit Union  
Brooke Holven, MEMBERS1st Community Credit Union  
Carly Husman, North Star Community Credit Union  
Adam Lenze, Premier Credit Union  
Jennifer Littleton, Members Community Credit Union  
Kayla Martens, 1st Gateway Credit Union  
Dan McGovern, Alliant Credit Union  
Julia Michalec, Metco Credit Union  
Geneva Miesner, Greater Iowa Credit Union  
Brenda Morrow, Financial Plus Credit Union  
Leah Oneyear, Premier Credit Union  
Morgan Phelps, Dupaco Community Credit Union  
Mack Rankin, Greater Iowa Credit Union  
Eric Sailsbury, River Valley Credit Union  
Breezie Saldana, Des Moines Metro Credit Union  
Brandon Scheitlin, Alliant Credit Union  
Stacy Schutte, 1st Gateway Credit Union  
Mallory Smith, Citizens Community Credit Union  
Kyle Sommers, Collins Community Credit Union  
Angie Sorenson, Gas and Electric Employees Credit Union  
Chelsea Steele, Premier Credit Union  
Michelle Stelken, Alliant Credit Union  
Beth Weiland, DuTrac Community Credit Union  
Jennifer Wilson, Peoples Credit Union  
Marissa Wolfgram, MEMBERS1st Community Credit Union  
Jennifer Wright, Iowa Heartland Credit Union

Each graduate of the program received a coaching resource book, as well as access to an online educational portal to continue their growth as financial coaches over time. This was the first year the financial coaching program was offered by ICUF.

“The mission of the Iowa Credit Union Foundation is to empower people and communities to achieve financial well-being by championing the credit union philosophy of people helping people,” said Danielle Gratton, Board Chair of ICUF. “We do this through offering critical programs such as the financial coaching program for credit union employees. Financial coaches make a difference, and we hope Iowa credit unions can be at the forefront of positively impacting the financial well-being of Iowans.”

#### About the Iowa Credit Union Foundation

Founded in 1995 as the philanthropic arm of the Iowa Credit Union League, the Iowa Credit Union Foundation's (ICUF) primary focus is the championing the financial well-being of Iowans through credit unions. ICUF seeks to carry out its mission to empower people and communities



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to achieve financial well-being by championing the credit union philosophy of people helping people, through its various programs, grants and scholarships. For more information, visit [www.IowaCreditUnionFoundation.org](http://www.IowaCreditUnionFoundation.org).

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