

## **Congratulations 2016 Award Winners**

Congratulations CUNA Brokerage Services, Inc. 2016 Award Winners. Included below are those who excelled in their roles with outstanding performance in 2016. Along with the award recipients are the qualifications for attaining their level of excellence.

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### **MVP of the Year Award**

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Recognizes top advisor in overall achievement. Selection committee gathers input from Sales Managers and the CBSI home office leadership. Requirements:

- Highest standard of ethics, professionalism and attitude
- Holistic approach to financial planning
- Appropriate balance of product mix
- Solid production (Gross Dealer Concession (GDC))
- Team player
- Mentoring involvement

**Doug Bert** – Suncoast Credit Union

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### **Advisor of the Year**

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Requirement: Top GDC producing Financial Services Advisor

**Costas Grekis** – Clearview Federal Credit Union

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### **RMSR of the Year**

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Requirement: Top GDC producing registered Member Services Representative

**Don Militzer** – Clearview Federal Credit Union

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### **Stone Ridge Award**

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Based on a scorecard, all CBSI Sales Managers and Dual Program Managers are eligible.

**Chris Rafanan** – CBSI Sales Manager, West Territory

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## Rookie of the Year Award

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Recognizes a top advisor in first full calendar year in their role as an advisor. A selection committee gathers input from Sales Managers and CBSI home office leadership. Requirements:

- Highest standard of ethics, professionalism and attitude
- Holistic approach to financial planning
- Usage of financial planning tools – needs-based focused
- Appropriate balance of product mix
- Solid production (GDC)
- Team player
- Fast Start Award Winner

**Christian Martinez** – Vantage West Credit Union

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## President's Council Award

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### Financial Advisors > 2 years with CBSI

- Top 25 advisors based on Total PC credit. PC Credit includes
- Total GDC (first year and renewal)
- 100% RMSR production
- 5% PC bonus on DIA, SPIA, and FIA

### Financial Advisors < 2 years with CBSI

- Top 2 advisors based on Total PC credit. PC Credit includes
- Total GDC (first year and renewal)
- 100% RMSR production
- 5% PC bonus on DIA, SPIA, and FIA

### President's Council Members:

**Michael Albert** – Collins Community Credit Union

**Dennis Archer** – Superior Choice Credit Union

**Troy Barta** - Connexus Credit Union

**Sal Bocchimuzzo** – Mid-Hudson Valley Federal Credit Union

**Jane Brockway** – University of Illinois Employees Credit Union

**Dan Campanelli** –Merck Employee Federal Credit Union

**Justin Dams** – Veridian Credit Union

**Sean Farrell** – Align Credit Union

**Paul Fedorko** – Sandia Laboratory Federal Credit Union

**Frank Feng** – Financial Center Credit Union

**Costas Grekis** – Clearview Federal Credit Union

**Breta Grumbois** – Fibre Federal Credit Union

**Mark Gorge** – Coast Central Credit Union

**Jeff Hamm** – Navigator Credit Union

**Randall Harris** – Ascend Federal Credit Union

**Chuck Headley** – Butler Armco Employees Credit Union

**Chris Hibbard** – Teachers Federal Credit Union

**Tyler Holbrook** – Goldenwest Federal Credit Union

**Mary LaFerriere** – Novartis Federal Credit Union  
**Maggie Leonard** – CBSI Sales Consultant  
**Jamie Letcher** – Summit Credit Union  
**Don Lutz** – Sandia Laboratory Federal Credit Union  
**Mike Mason** - MEMBERS Insurance and Investments  
**Dennis Mollison** – SchoolsFirst Federal Credit Union  
**Michael Packman** – Arsenal Credit Union  
**Ed Ranieri** – Sun East Federal Credit Union  
**Bryan Roberts** – American Heritage Federal Credit Union  
**Fred Sediqi** – SchoolsFirst Federal Credit Union  
**Gary Surak** – Service 1st Federal Credit Union  
**Steve Sylvester** – Charter Oak Federal Credit Union  
**David Trusler** – Energy One Federal Credit Union  
**Tom Waldron** – CBSI Sales Manager  
**Lyle Western** - MEMBERS Insurance and Investments

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### Top 3 Program Award - GDC

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Requirement: Must rank among top three GDC producing programs within the broker dealer.

<b>SchoolsFirst Federal Credit Union</b> – Santa Ana, CA	\$ 7,738,001
<b>Suncoast Credit Union</b> – Tampa, FL	\$ 4,091,522
<b>Teachers Credit Union</b> – South Bend, IN	\$ 3,344,544

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### Top Managed Program Award - Growth

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Recognizing highest growth in GDC year over year in a managed program with a \$500,000 minimum and a relationship with CBSI for at least 2 full calendar years.

<b>Commonwealth Credit Union</b> – Frankfort, KY	106% increase
David Young, Program Champion,	
Steve Tobin, Advisor	
John Whiteknight, CBSI Sales Manager	

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### Top Dual Program Award - Growth

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Recognizing highest growth in GDC year over year in a dual program with a \$500,000 minimum and a relationship with CBSI for at least 2 full calendar years.

<b>Goldenwest Federal Credit Union</b> – South Ogden, UT	37% increase
Tyler Holbrook & Mark Turner, Program Leaders	
Dan Larson, Advisor	
Myra Very, CBSI Dual Executive	

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### Top Sales Manager Award

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Recognizes the Top Sales Manager within CBSI based on an internal scorecard.

**Tom Waldron** – CBSI Sales Manager, Midwest Territory

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## 2017 Women of Distinction

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Recognizing top performing female advisors within CUNA Brokerage Services. Includes networking and mentorship opportunities designed to enrich experience, provide resources and enhance operational efficiency. Requirements:

- Female advisor with 3 years experience within the broker dealer (exceptions based on years of industry experience)
- \$ 275,000 GDC minimum (annual) or a \$300,000 average in the most recent 3 years
- Superior performance & value to their CU program
- Outstanding client service and contribution to the industry
- Nominated by Advisor's management (CU or Program level)
- (Documented) Active participation throughout previous calendar year (for subsequent award recipients)

### **Women of Distinction Members:**

**Melissa Acher** – Purdue Federal Credit Union

**Helen Alexander** – Red Canoe Credit Union

**Susan Breyer** – Altra Federal Credit Union

**Jane Brockway** – University of Illinois Credit Union

**Jody Brown** – Summit Credit Union

**Kathy Chesney** – Pacific Marine Credit Union

**Bethel Coleman** – The Tennessee Credit Union

**Nicole Corbet** – DuTrac Community Credit Union

**Jeneen Crane** – Teachers Credit Union (IN)

**Wendy Cundari** – San Diego Metropolitan Credit Union

**Carol Diest** – First Community Federal Credit Union

**Cynthia Garcia** – Vantage West Credit Union

**Marioreen Gibson** – Neches Federal Credit Union

**Leigh Glover** – Southeast Financial Federal Credit Union

**Joni Hootman** – CEFCU

**Anna Kamp** – Anheuser-Busch Employees Credit Union

**Leora King** – Advia Credit Union

**Chris Kusher** – Abbott Labs Federal Credit Union

**Mary LaFerriere** – Novartis Credit Union

**Stephanie Mayers** – Central Minnesota Credit Union

**Juanita McCormick** – Weokie Credit Union

**Nikki Moore** – Evansville Teachers Federal Credit Union

**Stephanie Morales** – Arizona Central Credit Union

**Susan Purdue** – Interra Credit Union

**Karen Reinertson** – Randolph Brooks Federal Credit Union

**Pamela Schwartz** – Alcoa Tenn Federal Credit Union

**Jodie Smith** – Matanuska Valley Federal Credit Union

**Jennifer Wagnerowski** – Teachers Credit Union (IN)

**Suzi Williams** – Yakima Valley Credit Union

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## 2017 Senior Advisor Leadership Team (SALT)

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Recognizing top advisors in overall achievement, appointing them as steering committee for potential CBSI applications. Selection committee includes peers and CBSI Home Office leadership. Requirements:

- Teleconferences, Committees and National Conference
- \$ 500,000 GDC - 3 year average
- Highest ethical standards and conduct at events
- Active in all SALT activities
- Superior leadership in CU
- Honors and Advisor Academy partnership
- Mentorship
- Longevity – more than 5 years

### Senior Advisor Leadership Team Members:

**Michael Albert** – Collins Community Credit Union  
**Dennis Archer** – Superior Choice Credit Union  
**Robin Arnold** – Palmetto Citizens Federal Credit Union  
**Michael Beck** – RTN Federal Credit Union  
**Sal Bocchimuzzo** – Mid-Hudson Valley Federal Credit Union  
**Brian Bock** – Collins Community Credit Union  
**Jane Brockway** – University of Illinois Employees Credit Union  
**Dan Campanelli** - Merck Employees Federal Credit Union  
**Justin Dams** – Veridian Credit Union  
**Paul Fedorko** – Sandia Laboratory Federal Credit Union  
**Frank Feng** – Financial Center Credit Union  
**Jeff Gagnon** – Navigant Credit Union  
**Leigh Glover** – Southeast Financial Federal Credit Union  
**Dean Goebel** – Central Minnesota Credit Union  
**David Goldpenny** – Cornerstone Community Federal Credit Union  
**Costas Grekis** – Clearview Federal Credit Union  
**Thad Guyton** – Georgia's Own Credit Union  
**Jeff Hamm** – Navigator Credit Union  
**Randall Harris** – Ascend Federal Credit Union  
**Chuck Headley** – Butler Armco Employees Credit Union  
**Chris Hibbard** – Teachers Credit Union (NY)  
**Eric Hilbun** – DuTrac Community Credit Union  
**Tyler Holbrook** – Goldenwest Federal Credit Union  
**Mary LaFerriere** – Novartis Credit Union  
**Don Lutz** – Sandia Laboratory Federal Credit Union  
**Juanita McCormick** – WEOKIE Credit Union  
**Steve Nilssen** – Evansville Teachers Federal Credit Union  
**Bryan Roberts** – American Heritage Federal Credit Union  
**John Rodriguez** – Randolph Brooks Federal Credit Union  
**Gary Surak** – Service 1st Federal Credit Union  
**Steve Sylvester** – Charter Oak Federal Credit Union  
**Jim Van Wert** – Cross Valley Federal Credit Union  
**Rick Whitmire** – American Heritage Federal Credit Union  
**Suzi Williams** – Yakima Valley Credit Union

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## Fast Start Winners

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Recognizing new CBSI Advisors (managed and dual) earning \$75,000 in GDC in their first six months after Advisor Academy

**Tracy Aalvik** – Fibre Federal Credit Union  
**Will DeBille** – Connex Credit Union  
**Kurt Decker** – Heritage Federal Credit Union  
**Jon Fox** - Truliant Federal Credit Union  
**Cody Fredrickson** – Azura Credit Union  
**Ron Hickson** – Virginia Credit Union  
**Trisha Horn** – Randolph Brooks Federal Credit Union  
**Curtis Malone** – Veridian Credit Union  
**Todd Micciche** – Unitus Community Credit Union  
**Jorge Macias** – GECU  
**Sergio Messina** – Teachers Federal Credit Union  
**Tiffany Nguyen** – SchoolsFirst Federal Credit Union  
**Jeff Olbina** – Indiana Members Credit Union  
**Josh Packman** – Arsonal Credit Union  
**Greg Perrey** - Indiana Members Credit Union  
**Mark Robbins** – DuTrac Community Credit Union  
**Jeff Rowland** – Robbins Financial Credit Union  
**Phyllis Sarabyn** – INOVA Federal Credit Union  
**Jeff Singer** – Central One Federal Credit Union  
**John Shepherd** – Fibre Federal Credit Union  
**Vince Stanley** - Matanuska Valley FCU  
**John Stanton** – CFE Credit Union  
**Blake Sutton** – Azura Credit Union  
**Scott Taylor** - Evansville Teachers Federal Credit Union  
**Tom Trost** – DuPage Credit Union