

DE Connects Volunteering & Community Service

THE National
Credit
Union FOUNDATION[®]

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**DE Program Director
National Credit Union Foundation**

Christopher Morris, CUDE
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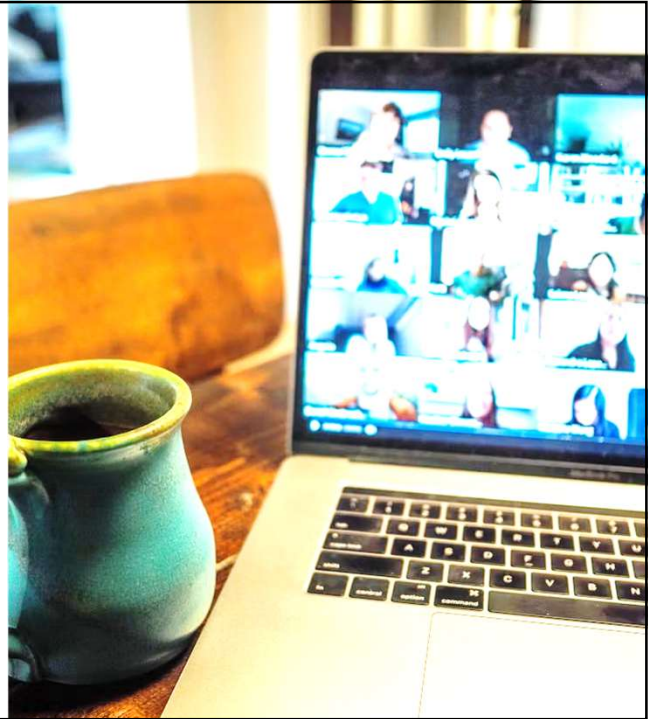


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Agenda

1. DE & Foundation Updates
2. New DE Share
3. DE Project Spotlight
4. DE Alumni Group Member Share
5. Open Discussion

THE National
Credit Union
FOUNDATION



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DE in 2027

6 in-person classes
1 virtual class



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Know anyone interested in 2027 DE Training?

Tell them to fill out the
contact form at
ncuf.coop to be put on
notification list.



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New DE Share



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OUR IDENTITY

The National Credit Union Foundation

Our Mission

We exist to improve financial well-being with and through credit unions.

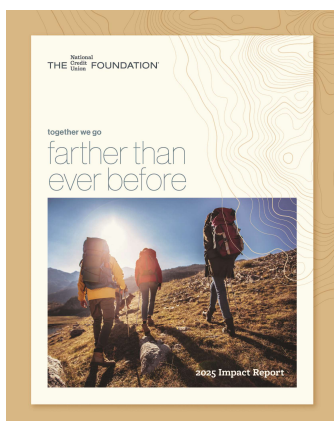
Our Vision

We envision a world where everyone can achieve financial well-being.

THE National Credit Union
FOUNDATION

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2025 Impact Report now available



This report reflects the power of people helping people in action. Together in 2025, the movement:

- Developed nearly 250 credit union leaders through the DE program
- Reached more than 2,200 youth through grant-supported initiatives
- Distributed more than \$379,000 through CUAid to support credit unions and credit union employees recovering from natural disasters
- Gathered more than 1,100 industry leaders to celebrate impact and strengthen connections across the movement



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Grant opportunity to advance financial well-being for at-risk youth

- We recently announced the opening of our At-Risk Youth Financial Well-Being Grant
- \$500,000 in funding available to support CUs expanding access, opportunity and financial well-being for young people facing systemic barriers
- Applications are now open and will be accepted through June 26, 2026
- Individual awards will generally be up to \$25,000, with approximately 20 CUs expected to receive funding
- More info at ncuf.coop

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DE DAY OF SERVICE

~HOUSING~

THE National Credit Union **FOUNDATION**

 Credit Union Development Education Program
Inspiring change through credit unions since 1982

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From Classrooms to Communities: Growing the Next Generation of Members!

EDUCATION

- Credit Unions Become Familiar, Before Needed!
- Financial Education Creates Confidence!
- Credit Unions Needed it, Just as Much as the Younger Generation Needed Credit Unions!



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Monthly Volunteering

madcudes.wordpress.com

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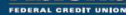
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— VISIONS —
Voice

- Visions FCU
 - Coming together to serve
 - Markets matter
 - Using the tools
 - Bringing it home!
- 
- The logo for Visions FCU, featuring a stylized blue line graphic followed by the word "VISIONS" in a sans-serif font, with "FCU" in a smaller font size below it.

NY – Snapshot and Profile

— VISIONS —
Voice




★ ★ ★ ★ ★ ★ ★ ★ ★ ★ 119th Congress ★ ★ ★ ★ ★ ★ ★ ★ ★ ★

Minority Leader Charles E. Schumer (D)

Website: schumer.senate.gov

Email/Contact: schumer.senate.gov/contact

District Address:
 15 Henry Street, Room 100 A-F
 Binghamton, NY 13901
 Phone: (607) 772-6792
 Fax: (607) 772-8124

Capitol Address:
 U.S. Senate
 322 Hart Senate Office Building
 Washington, DC 20510-0001
 Phone: (202) 224-6542
 Fax: (202) 228-3037

Committee Information:

- 1. Rules and Administration
- 2. Joint Inaugural Ceremonies
- 3. Senate Democratic Policy & Communication Committee



Background Information:

Nickname: Chuck

Hometown: Brooklyn, NY

Education: Bachelor's from Harvard University (1971);
 Doctorate from Harvard University (1974)

Previous Occupations: Staff Aide
 Birthday: 11/23/1950

Member Information:

Total Visits Members: 139,242

There are 34 offices in NY:

Aplachin	Harpursville HS	Owego (2)
Binghamton	Horseheads	Rochester
Cleone	Ithaca	Sutton Hill HS
Cortland	Johnson City	Spencer
Elmira	Newark Valley (2)	Syracuse
Endicott (2)	Neswich	Vestal (3)
Endwell (2)	Oneonta	Watkins Glen
		Windsor HS

Since 1961
VISIONS
 FEDERAL CREDIT UNION

VISIONS
 Voice

New York Region (as of December 2003)

Total Members 143,500
 Total Assets \$2,386,400,000
 Total Loans \$1,070,971,541
 Commercial Loans \$126,582,620

Automotive Finance 10%
 Business Finance 10%
 Credit Cards 10%
 Direct 10%
 Equity 10%
 Indirect 10%

Home Equity 10%
 Insurance 10%
 Personal 10%
 Reverse Mortgage 10%
 Student 10%
 Travel 10%
 Vehicle 10%
 Wholesale 10%

Change 10%
 Savings 10%
 Securities 10%
 Total 10%
 Other 10%

(in millions)

2003 Community Involvement

Over \$25-Million donated to Vision's communities, assisting 1,531 organizations

Delivers by State

NY \$25,119,392
 CT \$1,246,482
 NJ \$26,116

Impact Focus:

Anti-Crime & Community Empowerment
 Community & Economic Health & Initiatives
 Education & Welfare

\$32,080

Watershed Health
 and Landmark

13 High School

4,600+

Employee Assistance Program
 and Health

1,885 Recreational and entertainment and 46,185 homes, farms and schools

Product Memberships and Vision Credit Model

- Promote Credit Cardholders' change and credit card products
- Offer credit cardholders a 10% Annual Percentage Rate
- Support VISA as an Independent Credit Card Issuer
- Support VISA as a National Data Repository
- Support VISA as a National Credit Card Issuer

Promote Innovation/Regulatory Accountability

- Promote Credit Innovation and Accountability
- Promote Credit Innovation and Accountability
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One of the Top U.S. Credit Unions!

Vision is headquartered in Endicott, NY, and has branches in the New York and Pennsylvania.

For more information, contact
 Tech Specialist at techsupport@visions.org
 or 800.242.2119 ext. 9318

Visit us at visions.org

\$5.2B
 in assets

800+
 members

61
 offices

100+
 ATMs

250K+
 members

4M+
 members

**VISIONS
 LOVES
 EDUCATORS**

Over \$155,000

over \$100,000

100 student loan grants totaling

over \$150,000

114 education grants totaling

over \$100,000

Promote The Credit Union Tax Exemption

- Promote the Credit Union Tax Exemption
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- Promote the Credit Union Tax Exemption

Expand Assets on Vision's Members and Responsible Lending

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Oppose legislation and regulatory efforts that

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Establish a National Data Privacy Standard

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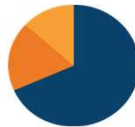
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Measure Impact!

VISIONS
Voice

2025 Community Involvement

Over \$2+ Million donated to Visions communities, assisting 1,131 organizations



Dollars by State

■ NY \$1,367,189
■ NJ \$366,462
■ PA \$263,106

Impact Focus:

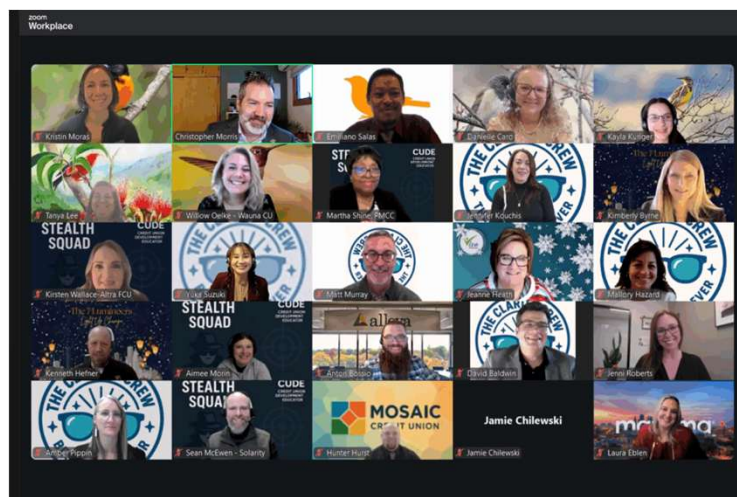
Arts, Civic & Community, Economic Development, Education, Health & Wellness, Veterans & Military



\$32,080 Visions Veterans Debit Card Giveback
13 High School Offices
4,600+ Employee Volunteer Hours
1,885 financial education presentations reached **46,185** children, teens, and adults

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Open Discussion



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Easy Ways to Get Involved *(starting today!)*

Start with you

- Find a cause you're personally passionate about
- Align service with your values, lived experience or community ties

Keep it simple & doable

- Commit to 1–2 hours a month to start
- Look for “low-barrier” options (weekends, after work, etc.)

Leverage what already exists

- Use your organization's volunteer hours / service policy
- Encourage your team or peers to join you

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Easy Ways to Get Involved *(starting today!)*

Use your skills for good

- Financial education, coaching, mentoring, board service
- Apply what you already know - no extra training needed

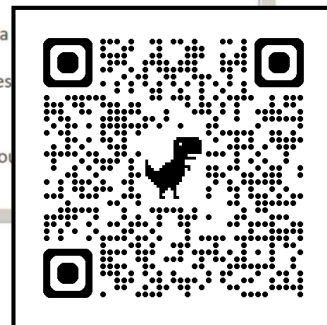
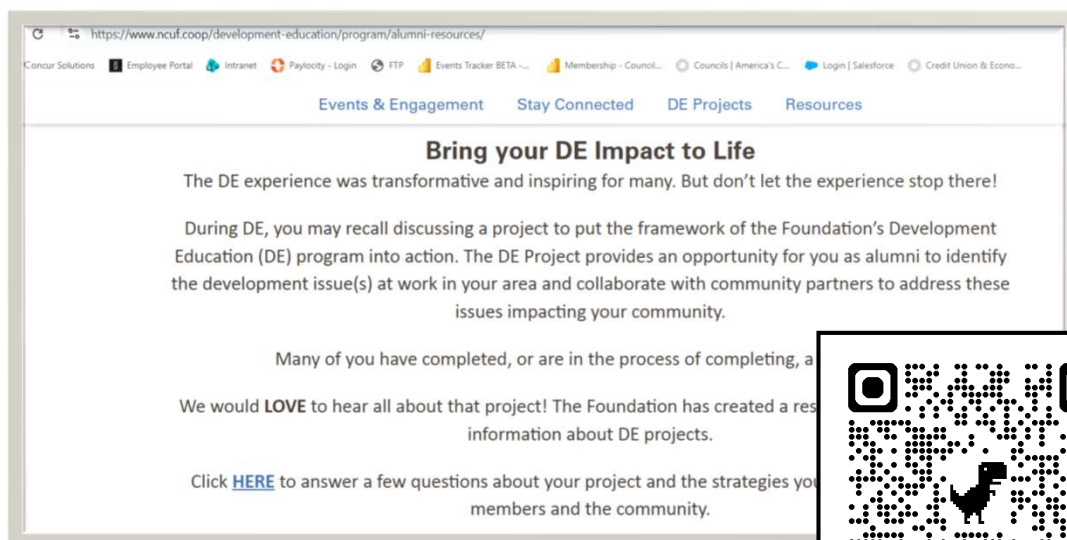
Make it social

- Invite a colleague, friend, or DE classmate
- Turn volunteering into a shared experience

Amplify the impact

- Share opportunities within your network
- Highlight stories of service to inspire others

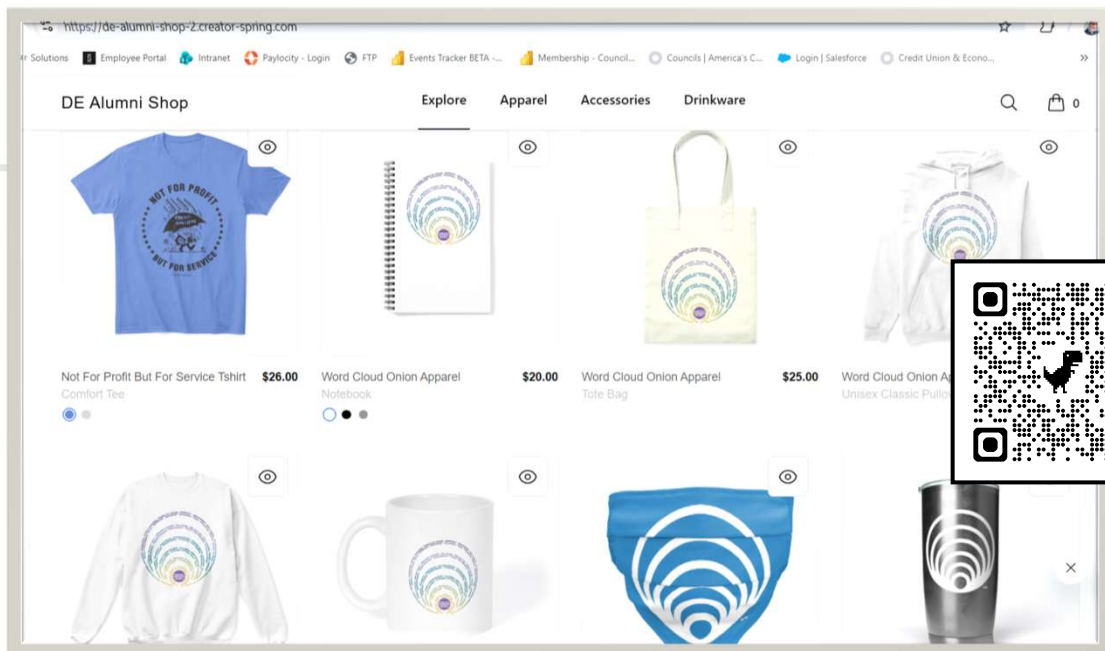
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DE Connects

A bi-monthly virtual gathering created specifically for DE alumni.

THE National
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FOUNDATION

Beyond Borders: The Global
Impact of DE

August 28th

1:00 PM (CST)

More info at ncuf.coop/de
Alumni Resources

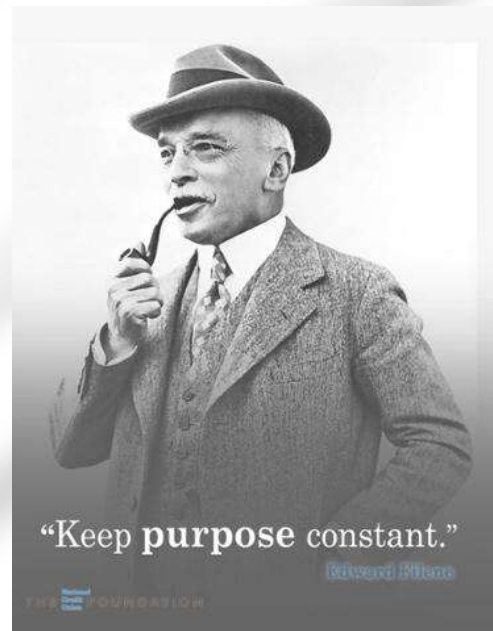
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Thank You!

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 Connect on LinkedIn



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