

January 2019

# Oregon State Credit Union difference



**Oregon State**  
Credit Union

## Your money should work for you

A credit union is a different kind of financial institution. We don't have stockholders, so we don't need to make a big profit to pay out stockholder dividends. Instead, we invest our excess earnings

back into the credit union to give our members competitive rates, fewer fees and more services. That's your money working for you, not for someone else. That's the credit union difference.



## Meet your Board nominees

This is your opportunity to meet member candidates seeking to serve on your Board of Directors. Board members, elected by fellow members, determine the general direction of the credit union. Our Board members commit their time, skills and experience to help your credit union prosper in the years ahead.

### Jay Conroy, Incumbent

Jay resides in Corvallis with his wife, Judy, and is an adjunct instructor at Oregon State University and University of Portland in teacher education and educational leadership development. He previously served for 28 years in secondary education, including in leadership positions at schools in Eugene, Corvallis and Philomath and teaching positions at CHS and CVHS. He is a member of Corvallis 509J School Board. He has volunteered with St. Mary's Catholic Church and AYSO Soccer. His Oregon State Credit Union experience includes: Board member, April 2010-present; second vice chairman of the Board, April 2015-present; and the Planning, Board Governance, Executive and Financial Risk Management committees.

### Shannon Cruz, Incumbent

Shannon is a former USA Gymnastics judge and program analyst with the Linn/Benton/Lincoln Department of Human Services. She has served on the Oregon State Credit Union Board of Directors since November 2006 in



**Jay Conroy**



**Shannon Cruz**



**Ana Lu Fonseca**



**Kelley Kaiser**

## Save the date for the Annual Business Meeting: April 3, 2019

Thanks to all our member-owners, local decision-making and financial cooperation, your loans and deposits work hard and give you and your community trusted, secure financial services. Attend the Annual Business Meeting to hear about 2018 achievements from the Chairman of the Board and the President/CEO and to elect four Directors to open positions on the Board of Directors.

- Annual Business Meeting on April 3, 2019
- 5:30 p.m. doors open
- 5:30 p.m. registration begins
- 6:00 p.m. meeting begins

### Location

Oregon State Credit Union  
Sunset Operations Center  
4800 SW Research Way, Corvallis

### Voting and nomination procedures

The Nominating Committee has proposed one candidate for each vacancy on the Board of Directors. No nominations will be allowed

*Save the date, continued on page 2 →*

*Meet your Board nominees, continued on page 2 →*

Meet your Board nominees, continued from page 1 →

various positions including chairman and first and second vice chairman. She was on the Supervisory Committee from December 2003 to November 2006, where she served as chairman and secretary. She has served on the following committees: Planning, Nominating, Executive, Financial Services, Board Governance and Financial Risk Management.

#### Ana Lu Fonseca

Ana Lu is the Assistant Director of Diversity, Equity and Inclusion for Oregon State University's Division of University Outreach and Engagement. She is a former Positive Youth Development Assistant Professor of Practice and member of the Hispanic Advisory Council of Linn and Benton counties. She has served on the Oregon State Credit Union Board of Directors since April 2018, where she has served on the Planning Committee. Ana Lu is a resident of Corvallis.

#### Kelley Kaiser

Kelley is the Senior Vice President – Chief Administrative Officer for Samaritan Health Services, an Integrated Delivery System with five hospitals, more than 450 clinicians and two health plans in the Mid-Willamette Valley. Previous to this role, she was the CEO for Samaritan Health Plans, Inc. and Inter-Community Health Network-Coordinated Care Organization; was the vice president of Corporate Services for Samaritan Health Services; and has had executive responsibility for various Samaritan Health Services physician groups. She is a member of the Rotary Club of Corvallis and the Corvallis Chamber of Commerce. She joined the Oregon State Credit Union Supervisory Committee in September 2009 and was elected to the Board of Directors in 2016. She has served on the following committees: Financial Services, Planning and Nominating.

Save the date for the Annual Business Meeting: April 3, 2019, continued from page 1 →

from the floor at the Annual Business Meeting. No member shall have more than one vote. Election will be conducted by voice vote.

Prior to the Annual Business Meeting, any member may petition to nominate another member to run for election to the Board by taking the following steps:

- Obtain a petition packet. Packets are available at any of our branches. Find the location of the branch nearest you at [oregonstatecu.com/branches-and-atms](https://oregonstatecu.com/branches-and-atms).
- Verify that the member you wish to nominate is willing to serve. Have the member sign a Certificate of Willingness to Serve, included with the petition packet.
- Obtain a written Statement of Qualifications and a biographical statement from your nominee and submit it with the petition.

- Collect member signatures on a nominating petition. In accordance with credit union bylaws, at least 500 signatures are required to nominate a candidate by petition.

Please return the completed documentation to Vicki Stevens, Oregon State Credit Union, PO Box 306, Corvallis, OR 97339, by February 5, 2019.



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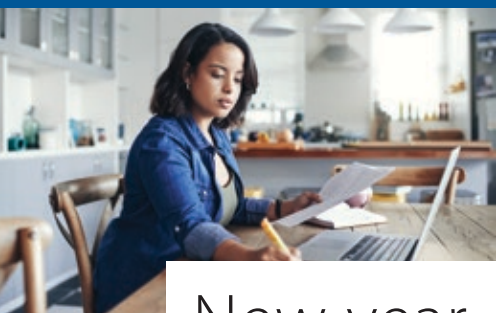


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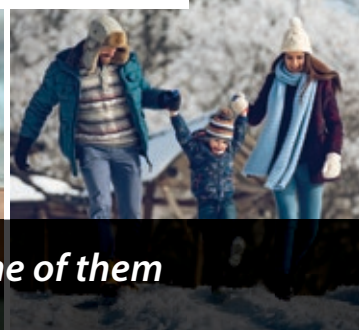


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