

Insight, Inspiration, and Collaboration Take Center Stage at the 2025 Corelation Executive Forum

This year’s Corelation Executive Forum was more than just a gathering — it was a meeting of minds, a spark of innovation, and a celebration of collaboration within the credit union community. Held at the InterContinental San Diego, the two-day event brought together leaders from across the country to exchange insights and explore what’s next for the industry. From thought-provoking sessions to open discussions and after-hours networking, the energy was high from start to finish.

Focused on leading with purpose and agility, this year’s program explored how vision, resilience, and connection continue to drive the credit union movement forward.

Day one opened with a warm welcome from Corelation CEO Rob Landis, followed by keynote speaker Kris Kovacs, Founder and Digital Strategy Coach at Withacay Ventures. His session, *“Don’t Go Chasing Waterfalls: How to Innovate with TLC,”* set the tone for a day focused on adaptable leadership and creative problem-solving in a rapidly changing environment.



Clint Summers of Homebase Credit Union shared personal lessons in overcoming challenges to build stronger, more empathetic teams, while Bill Hampel, Economic Consultant, provided a clear-eyed look at the U.S. economy and its implications for credit unions in the coming year. The day concluded with Karan Kashyap, CEO and Co-Founder of Posh, who explored member and employee expectations in the age of AI — sparking rich discussion among attendees about balancing technology with the human touch.

Day two offered dual learning tracks — Executive and Technology — allowing participants to tailor their experience and dive deeper into leadership and emerging trends. In the Executive Track, Cortney Arnold of Filene’s Cooperative Trust spoke about the importance of purpose-driven leadership and cultivating strong, community minded teams. Geoff Bacino of Bacino & Associates provided valuable perspective on the current regulatory landscape and the future of the credit union tax exemption. LeAnn Case, Board Chair of the TriUnity Foundation, encouraged attendees to think about

philanthropy as a meaningful part of long-term growth and legacy planning.

Meanwhile, the Technology Track focused on risk management, innovation, and the evolution of digital services. Mike Burke of SHAZAM discussed preparedness and resilience in times of crisis, while Donald Arkell of CU Lending Advice examined how digital assets are reshaping financial services. Mart Vos, CEO of Eko, closed out the track by exploring how credit unions can build lasting member relationships in an increasingly digital world. The forum wrapped with engaging vendor speed rounds and a closing reception where conversations flowed as freely as the ideas.



“My first Corelation Executive Forum was a powerful reminder of where credit unions are headed and the challenges we face,” shared Julie Willse, Chief Operations Officer of Greater Iowa Credit Union, which is preparing for its upcoming conversion onto KeyStone. “The sessions offered forward-thinking insights that reinforced our mission and values and encouraged us to innovate for the future. Connecting with leaders who share a passion for a member-centric approach made the experience truly transformative. I left inspired and supported as we move toward our conversion date in 2026.”

As the event concluded and new connections took shape, one thing was clear: the Corelation Executive Forum remains a place where leaders grow together — sharing ideas, celebrating innovation, and strengthening the credit union community. This year also marked a special new moment for the event, as Rob Landis and CIO Jeff Dent presented the inaugural Corelation Leadership Award to Corelation CEO Emeritus Theresa Benavidez, who was genuinely surprised and honored to receive the recognition.

We can’t wait to welcome everyone back next year! 🍷



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Note from the CEO

Dear Friends,

I'd like to extend my thanks to all of you who were able to join us at our recent Executive Forum – that opportunity to reconnect and collaborate will stand as one of my fondest memories of the year. And for those who weren't able to join us, we hope to see you in 2026! In the meantime, I'd like to share with you my personal highlight of this year's event. In years past I have closed the Forum with an interactive recap of the many topics introduced and debated by the community of attendees. But this year, Jeff Dent and I took the opportunity not to reflect on the prior few days, but publicly to honor (and totally surprise!) our CEO Emeritus, Theresa Benavidez.

You may be surprised to learn that Theresa has known me for literally my entire life – she met me when I was one day old. Over the years, she has been my “work-aunt”, my boss, my friend, and my mentor. I have learned so much from Theresa, and while she has taught me plenty about credit unions and about business, most important of all is what she has taught me about leadership through the example she has set each and every day.

Theresa is an incredible servant leader, the embodiment of leading with your heart. She shows me that it's ok to be your authentic self as a leader, even if you're authentically a little goofy sometimes.

She shows me that your true character is revealed by how you carry yourself in the tough times. She inspires us all at Corelation by her passion for this industry, and by her genuine love for the people in it.

And so it felt fitting to reflect back to her our profound gratitude for all she has taught us by naming our company's culture award in her honor. What was once the SPICY Award – a celebration of our leadership principles to be Supportive, Passionate, Involved, Creative, and Yourself – will forevermore be the Theresa Benavidez Leadership Award. It will continue to be passed from one Corelative to another to acknowledge those who go above and beyond in their work, but now it will bear the name of the spiciest person we've ever known.

Theresa, on behalf of everyone you've touched in your extraordinary career: thank you!

- Rob Landis, CEO, Corelation Inc.



Employee Spotlight: Tanya Kaminar, Professional Services Consultant III

From the redwood forests of Santa Cruz to the lush landscapes of Washington State, Tanya Kaminar's journey is marked by curiosity, resilience, and a dedication to helping others succeed. Growing up on a ranch in Big Basin State Park, she spent her childhood riding horses and exploring the outdoors. At 19, she moved to Hollywood, CA and began her credit union career at 20th Century Fox Credit Union, eventually returning to Silicon Valley and building a 25-year career in credit unions, including managing electronic services departments.

Tanya's path to Corelation began when her credit union became the 28th to convert onto KeyStone, inspiring her to join the company in 2016. She spent five years as a Conversion Strategist, helping credit unions transition seamlessly to KeyStone, and now serves as a Professional Services Consultant III. In her current role, she acts as both an investigator and consultant, helping credit unions optimize their processes and configurations to make daily operations easier. As she explains, “It's imperative that I understand how the credit union is utilizing KeyStone. My goal is to make their lives easier through process and configuration recommendations.”

For Tanya, the most rewarding part of her work is mentorship and collaboration. “The best reward is mentoring and helping

both fellow Corelation employees and credit union employees succeed,” she says. She especially enjoys client moments of breakthrough: “When they're open and willing to dig in — and you can see them learning without frustration — that's the best feeling.”

Within Corelation, Tanya values the company's collaborative culture and appreciation for individuality. She particularly enjoys working with the Professional Services Consultant team and holds the distinction of being Corelation's first remote employee, having worked with leadership to make remote work possible long before it became common practice. She also was the first conversion strategist to partake in Corelation's first remote conversion.

Outside of work, Tanya embraces the great outdoors and family time. Living in the Pacific Northwest, she spends her free time hiking, exploring new locations, and enjoying moments with her children and grandbaby.

From her beginnings in Big Basin to supporting credit unions nationwide on KeyStone, Tanya's journey reflects growth, passion, and genuine care — for her colleagues, clients, and community alike. We're grateful for Tanya's dedication and the difference she makes every day! 🍷



Corelation Cares: The Corelation Charitable Committee Empowers Employees to Make an Impact

Corelation's commitment to community has long been a defining part of who we are — and in 2024, that dedication took on new shape through the formation of the Corelation Charitable Committee (CCC). Launched in January, the committee was created with one clear purpose: to empower employees to direct meaningful support to the local organizations that have touched their lives the most.



The CCC is intentionally employee-driven, giving volunteers from across the company the opportunity to review applications, learn about the causes their colleagues are passionate about, and thoughtfully select where funds can make the greatest impact. With an overwhelming number of Corelatives eager to

participate, the committee has quickly become a powerful expression of our shared values, compassion, and commitment to community.

"Our goal from the beginning was to build a process that felt personal," shared committee member Joelle Morgan-Sattler. "For a remote-first organization, it's one of the ways we can continue to live our core values and stay connected through purpose."

As part of the nomination process, participants are encouraged to share the story behind their chosen organization — what it does and why it matters to them personally. In fact, nearly 90% of submissions come from individuals who have been

directly touched by these causes, whether through health challenges, mental wellness support, sobriety programs, youth development opportunities, animal welfare, or food security services.

One of this year's selected organizations was the Pete Brown Junior Tennis Program (PBJTP), nominated by Corelative Bryce Everett. PBJTP is a South Central Los Angeles nonprofit that provides free or low-cost tennis, mentoring, and academic support, using the sport to build confidence and opportunities for local youth. Reflecting on Corelation's support, Bryce shared, "As a Corelative, it just makes you proud to work for an organization that prioritizes supporting your personal as well as professional passions."

This year's selections span a wide range of causes — from bringing comfort to children in cancer care to supporting animal shelters and community food programs. Each nomination serves as a reminder of the compassion and real-life connections behind our employees' advocacy.

"It's emotional work in the best way," shared committee member Val Jacobellis. "We get to sprinkle a little bit of love into so many communities. It's a privilege to be part of it."

As the Corelation Charitable Committee enters its third round of applications, the team is also building a "scrapbook" to capture the stories, photos, and outcomes tied to each donation — creating a lasting record of how Corelation's generosity is making a difference nationwide. 📖



Upcoming Training & Seminars sponsored by Unit21

For the full list of upcoming Corelation training offerings and to register for courses, [click here](#). (Confluence access required)

HELOCs 101

January 26th
12-1pm PST

Advanced Queues

February 25th
12-1pm PST

Commercial Lending in KeyStone

March 31st
12-1:30pm PST

Back-Office Technical Training

KeyBridge Training
February 17-18

Beginner Reports Training
January 13-15 • February 10-12 •
March 10-12

Advanced Reports Training
April 21-23

UI Scripting Training
March 10-12

Batch Scripting Training
January 20-22 • March 17-19

KeyStone Server Administration
February 3-4

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Corelation Client News & Success



Each year more than 20,000 young people age out of foster care in the United States, often with no safety net and little financial education. To help support these individuals, Mountain America Credit Union partnered with Milestone Home to transform donated property in Utah into safe transitional housing where residents pay modest rent, build savings, and receive mentoring and financial education. Suzanne Oliver, vice president of the Mountain America Foundation, says it's about more than just housing. "The relief these youth felt to be safe and to have their own room — sometimes for the first time — was powerful. It was emotional to be involved." [Check out the full story here.](#)



Congratulations to Reliant Credit Union, which was recently honored with a 2025 Elevating Women Award by the Rochester Business

Journal for its strong commitment to advancing women in leadership. The recognition highlights Reliant's intentional focus on fostering a supportive culture, expanding mentorship and growth opportunities, and ensuring women are represented across all levels of leadership. The award also reflects the credit union's broader dedication to empowering its workforce and community. [Read the whole story here!](#)



Preferred Partner Spotlight: CXI

Currency Exchange International

For a full list of Corelation partners, [click here](#).

As credit unions face growing demand for faster, more reliable payment solutions, the need to modernize both domestic and international payments has never been greater. Legacy wire systems and manual reconciliation processes often limit scalability, increase compliance risk, and reduce member satisfaction—particularly as expectations for speed, transparency, and integration continue to rise.

For executives seeking to streamline operations and future-proof their payment infrastructure, the challenge is clear: how to deliver a unified, real-time experience across all payment rails without adding vendor complexity or operational burden.

Currency Exchange International (CXI) provides a comprehensive payments solution through its One Provider, One Platform model. Designed specifically for financial institutions, CXI's web-based platform automates domestic and international wire payments, integrates directly with KeyStone, and eliminates the inefficiencies of managing multiple systems. From automated compliance and real-time fraud detection to audit reporting and account settlement, every function operates within a single, secure environment.

CXI supports over 4,000 financial institutions, including more than 1,500 clients using its wire system across institutions ranging in asset size from \$50 million to \$40 billion. Credit unions leveraging CXI's platform gain measurable efficiencies — faster processing, fewer errors, and simplified reconciliation — while enhancing the member experience with modern, digital-first payment capabilities.



**CURRENCY EXCHANGE
INTERNATIONAL**

One Provider. One Platform.

Supported by CXI's world-class service and deep market expertise, credit unions can confidently expand their reach, strengthen compliance, and redirect valuable staff time from manual processes to strategic growth initiatives.

With CXI, credit unions achieve more than automation — they gain a trusted partner delivering the next generation of payment services with precision, efficiency, and reliability.

For additional information, please contact your Corelation Relationship Manager or CXI directly at Bailey Nelson at Bailey.Nelson@cxifx.com



New KeyBridge Certified Vendors

(Through December 5, 2025)



Quavo

Collaboration and Connection Shine at the Northeast User Group's Annual Meeting

The Corelation Northeast User Group continues to grow as a collaborative community for credit unions using the KeyStone core, offering a platform to exchange ideas, share best practices, and strengthen collective knowledge.

This year's sixth annual in-person meeting, held October 22–23 at PSECU headquarters in Harrisburg, PA, brought together 70 attendees from 28 credit unions across the region. The event once again highlighted the group's mission of connection and learning.

"We all use KeyStone, but we each use it differently," shared Pam Martin, VP Member Services of Park View Federal Credit Union and member of the advisory committee. "The beauty of this group is discovering how others are using it — finding new efficiencies, creative workflows, and new ways to approach challenges."

The two-day agenda featured peer-led sessions, vendor presentations, and open discussions. Hot topics included fraud prevention and cybersecurity, with insights from industry experts Jim Stickley and PureIT. The group also hosted its own version of the "Coolness of Corelation," where five credit unions showcased innovative ways they've customized and optimized KeyStone.



A new addition this year — a dedicated open discussion session — quickly became a highlight. "It provided space for everyone to ask questions freely and get real-time feedback," said Pam. "That openness sparked some of the most valuable conversations."

Corelation was represented by several Client Relationship Managers and a Technical Trainer, who joined to share updates and connect directly with clients. Seven vendor sponsors also participated, each presenting their latest solutions.

Looking ahead, the group announced plans to expand its advisory committee from four to six members, creating three-year terms to ensure fresh perspectives and continuity.

"The collaboration in the credit union space is amazing," Pam added. "Every year we leave with new ideas — and even follow-up calls already scheduled — to keep learning from each other."

To join the Northeast User Group, contact your Client Relationship Manager or one of the admins [listed on Confluence](#)*. 📄

**Confluence access required*

Welcome, New Clients

(Through December 5, 2025)

Baton Rouge Telco Federal Credit Union

\$450 million in assets
Baton Rouge, LA



Mid-Atlantic Federal Credit Union

\$439 million in assets
Germantown, MD



City & County Credit Union

\$1.2 billion in assets
Saint Paul, MN



IDB Global Federal Credit Union

\$821 million in assets
Washington, DC



LBS Financial Credit Union

\$2.1 billion in assets
Long Beach, CA



Colorado Federal Credit Union

\$188 million in assets
Grand Junction, CO



Beacon Federal Credit Union

\$203 million in assets
La Porte, TX



Marshall Community Credit Union

\$351 million in assets
Marshall, MI



Velocity Community Credit Union

\$499 million in assets
Palm Beach Gardens, FL



Conversiongram



Pittsford Federal Credit Union!



Universal 1 Credit Union and Yoda



Selfies at Sun Federal Credit Union



Honor Credit Union Gets Ready



Unity One CU Pose for the Camera



Summit CU Ready for KeyStone



The Summit Credit Union Conversion Team



The Unity One Credit Union Team!



The Mario Brothers at State Employees CU!



Leaders Credit Union Group Pic



Universal 1 CU's Darth Vader!



Valley Financial CU Celebrates



The Gang at Sun FCU!

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