

# TRUST

for Credit Unions

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## PRESS RELEASE

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## 2012 Outlook Webinar Featuring Credit Union CEOs Tom Dorety and Frank Pollack

**Washington, DC** – Callahan Financial Services and Dwight Johnston Economics are jointly hosting a free webinar on Thursday, February 9, at 2:30 p.m. (EST). The webinar will feature a lively discussion with Frank Pollack and Tom Dorety, CEOs of Pentagon FCU (\$15B) and Suncoast Schools FCU (\$4.9B). Credit unions may register at [www.trustcu.com](http://www.trustcu.com)

“The purpose of this open dialogue is to help credit union senior managers evaluate their balance sheet plans for 2012,” says Chip Filson, CEO of Callahan Financial Services. “These CEOs are from two of America’s largest credit unions. They have different market areas, unique challenges, and defined strategies. This is a great opportunity to hear proven performance leaders as they think out loud.”

Pollack and Dorety will address questions such as:

- What were your credit union’s most noteworthy accomplishments in 2011?
- How does the economic outlook influence your plans for 2012?
- What will drive the success of your credit union’s performance in 2012?
- What critical *external* indicators do you track to make key business decisions?
- How does the regulatory environment or examiners’ views impact your priorities?
- How can smaller credit unions learn from your judgments and experiences?

Filson will lay the foundation with a summary review of industry performance in 2011, the best year ever for increasing reserves and net worth. Johnston will provide an economic and financial framework for 2012 and moderate the conversation as Pollack and Dorety discuss their approach to 2012. Participants are encouraged to participate, and a session recording will be available for future viewing at [www.trustcu.com](http://www.trustcu.com).

**Callahan Financial Services** is the administrator and distributor for Trust for Credit Unions, which provides credit unions with three professionally managed investment portfolios. As of January 31, 2012, more than 100 credit unions were investing in TCU with total balances of \$1.1 billion in the family of funds. TCU is an SEC-registered, open-end mutual fund built on the cooperative principles of shared risk, scalability, democratic governance, and member value. Its investments are limited to only those authorized for credit unions in the Federal Credit Union Act.

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