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PRESS RELEASE

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Callahan & Associates and CU Strategic Planning Combine To Increase Credit Union Impact

Washington, DC – Callahan & Associates and CU Strategic Planning proudly announce their strategic alliance, driven by a shared vision to empower credit unions to make a meaningful impact on their members and communities. This union combines the strengths of both organizations, bringing together a wealth of expertise, innovative solutions, and a shared dedication to transforming the credit union movement.

Together, Callahan & Associates and CU Strategic Planning will provide their award-winning offerings with even greater value, more dynamic capabilities, and increased innovation to help more credit unions thrive.

Jon Jeffreys, currently CEO at Callahan & Associates, will serve as CEO of the new combined organization. Stacy Augustine will become President of CU Strategic Planning, a Callahan Company.

"Joining forces with CU Strategic Planning just feels right." said Jon Jeffreys, "I'm so excited to see the impact we can have on the industry together. Moving forward as one organization, we are even better positioned to serve our credit unions, while driving growth and positive change within the movement."

"This announcement represents a new chapter in our journey to support the long-term relevancy and impact of credit unions across America," said Stacy Augustine, President of CU Strategic Planning. "Callahan's products and services have been transformational for us and our clients. We are beyond excited about the opportunities this alliance brings and look forward to delivering even greater value to our credit unions, together."

Moving forward, CU Strategic Planning will operate as a Callahan & Associates company. Both organizations will retain all staff to maintain seamless operations. This transition signifies a new chapter in their shared journey to drive positive change and support the growth and long-term relevancy of credit unions across the movement.

About Callahan & Associates

For nearly 40 years, Callahan & Associates has been instrumental in guiding credit union leaders to make informed strategic decisions to ensure their long-term relevance. They accomplish this by helping credit unions measure performance, identify strategic opportunities, and build collaborative networks, all through a mission-focused lens. Learn more at www.callahan.com.

About CU Strategic Planning

Since 2008, [CU Strategic Planning](http://www.callahan.com) has provided business planning services for credit unions focusing on community development and is the No. 1 CDFI certification, grant-writing and compliance firm for credit unions in the country, securing and managing compliance for \$945 million in US Treasury CDFI grants and related award funding. Through grants, strategic and tactical planning, community summit facilitation and more, CU Strategic Planning achieves its mission to unlock opportunities for credit unions to change lives and their communities.