

Elder Financial Protection Network Names Callis, Key Point CU Executive, To Board

SANTA CLARA, Calif. — Juli Anne Callis has been named to the board of directors of the Elder Financial Protection Network.

The network is a 501(c) 3 nonprofit organization that works to prevent financial abuse of elders through partnerships that build public awareness, drive community outreach and provide professional training.

Callis is executive vice president and chief operating officer at \$820 million KeyPoint Credit Union as well as president of KeyPoint Financial Services.

"Her amazing breadth of experience in financial services, along with her passion for supporting the safety and independence of seniors, will be a valuable addition to our dynamic team," said Jenefer Duane, CEO and executive director of the network.

Callis is a long-time advocate for the elderly. She previously served as director of services for the elderly for Greene and Lenoir counties in North Carolina. In this position, she worked with local, state and federal organizations to bring meals on wheels, congregate centers and home health care to thousands of elderly residents.

—msamaad@cutimes.com

Truliant FCU Financial Adviser Terry Colen Earns Performance Accolade

WINSTON-SALEM, N.C. — Terry Colen, a financial adviser at Truliant Federal Credit Union, has been recognized as a President's Council performer by CUNA Brokerage Services Inc.

The President's Council is the highest recognition financial advisers licensed through CUNA Brokerage Services can achieve, according to CUNA Mutual Group.

Colen is a vice president, financial adviser, trust liaison officer and a chartered retirement planning counselor at \$1.1 billion Truliant FCU. He has worked for more than 20 years in the financial services industry as a mutual fund specialist,

stockbroker and registered investment adviser representative.

"I am very excited to be part of such an elite group of advisers," Colen said. "Over the years, I have helped a lot of people meet their financial goals, and Truliant has really enabled me to be successful by focusing on our member-owners complete financial needs."

CUNA Mutual President/CEO Jeff Post said the President's Council is an exclusive and elite group. "CUNA Mutual has a performance-based culture, and the honor and exclusivity of qualifying for President's Council is reserved for the absolute best



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Colen said because he is paid a flat salary and doesn't have to worry about commissions, he can "truly focus on what is best for the client without the added pressure of meeting sales goals."

"Our relationship with CUNA [Mutual] offers me a wide range of best in class products that allow me to make sure I am always doing what is truly best for our member-owners and their future," Colen said.

CBSI provides broker dealer services to nearly 400 credit unions nationwide.

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