

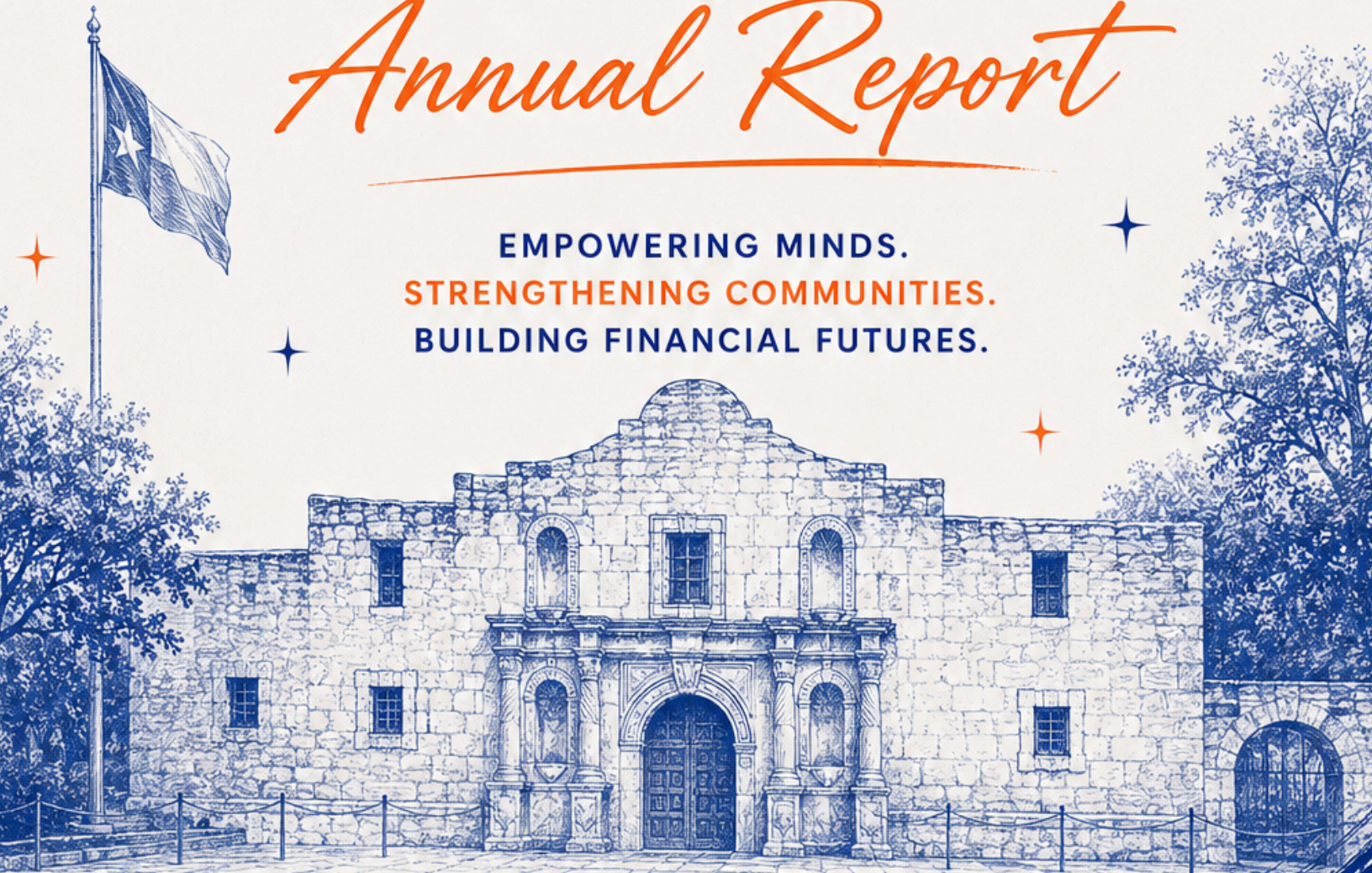


★
CONNECT • COLLABORATE • CULTIVATE

2026

Annual Report

EMPOWERING MINDS.
STRENGTHENING COMMUNITIES.
BUILDING FINANCIAL FUTURES.



★
*Thank you for believing in the mission of CUFEN
and helping make this conference possible.*

CUFEN 2026

Connect. Collaborate. Cultivate.



*Every conversation begins with a welcome.
Every connection begins here.*



Welcome to a community committed
to strengthening financial education—
one conversation, one connection,
and one idea at a time.

We're so glad you're here.

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Letter from Chair

Dear CUFEN Members, Partners, and Friends,

Some years are measured by milestones. Others are measured by the people who leave an indelible mark on our lives. For CUFEN, 2025-2026 will always be remembered as both.

As we entered the year, we celebrated one of the most significant achievements in our organization's history. In January, CUFEN officially became a nonprofit organization governed by its inaugural Board of Directors. What had once operated as an Executive Committee dedicated primarily to conference planning had evolved into an organization with a lasting governance structure, positioned to serve and strengthen financial educators for years to come.

This milestone was years in the making. It was the product of countless hours of planning, collaboration, and unwavering dedication from many individuals who believed deeply in CUFEN's mission. At the heart of that effort was our beloved Chair, Trysh Olson.

Trysh was more than an exceptional leader - she was a woman with a mission. Her passion for financial education was matched only by her determination to see CUFEN become something greater than an annual conference. She envisioned an organization with a sustainable future, one that would continue developing leaders, fostering collaboration, and advancing financial education long after any one individual had served.

Following an incredibly successful conference in Philadelphia in July 2025, our CUFEN family experienced the unimaginable loss of Trysh that September. Her passing left a void that can never truly be filled. We mourned not only an extraordinary Chair, but a dear friend, mentor, encourager, and steadfast advocate for the credit union movement.

Although Trysh was not here to celebrate CUFEN's nonprofit status in January 2026, her vision was. Every conversation she led, every challenge she encouraged us to embrace, and every step she helped take toward this transformation became part of the foundation on which we now stand. She prepared this organization not simply for success, but for sustainability.

Because of that foundation, our inaugural Board of Directors was able to focus this year not on rebuilding, but on stewarding the organization she believed in so deeply. We embraced the responsibility of carrying her vision forward - strengthening CUFEN, serving our members, and ensuring that the mission she championed continues to flourish.

As I reflect on this past year, I am reminded that leadership is not measured by titles or tenure. It is measured by the lives we influence, the opportunities we create for others, and the legacy we leave behind. Trysh embodied each of those qualities, and CUFEN is stronger today because of her faithful leadership.

The future of CUFEN is bright - not because of any one person, but because of the countless volunteers, members, sponsors, business partners, and friends who continue to believe in our mission. Together, we will honor the past by building an even stronger future, always remembering that the greatest legacy we can offer those who came before us is to continue the work they so passionately began.

It is an incredible honor to serve as Chair of the Credit Union Financial Education Network. Thank you for your trust, your partnership, and your continued commitment to advancing financial education and the credit union philosophy of People Helping People.

With gratitude,

Myra Arzate-Miera

CUFEN Chair

2026 ANNUAL REPORT

EMPOWERING MINDS. STRENGTHENING COMMUNITIES.

BUILDING FINANCIAL FUTURES.

Less than 150 M



MOST STUDENTS

Reached

- | | | |
|---|---------------|-------|
| 1 | Tewksbury FCU | 2,650 |
| 2 | Pheple FCU | 2,429 |
| 3 | Lanco FCU | 1,985 |



MOST ADULTS

Reached

- | | | |
|---|-------------------------|-----|
| 1 | Santa Ana FCU | 850 |
| 2 | Northern Communities CU | 596 |
| 3 | Heritage USA FCU | 560 |



MOST STUDENT PRESENTATIONS

Delivered

- | | | |
|---|------------------------|-----|
| 1 | Lanco FCU | 482 |
| 2 | Limestone Financial CU | 268 |
| 3 | Heritage USA FCU | 190 |



MOST ADULT PRESENTATIONS

Delivered

- | | | |
|---|------------------------|-----|
| 1 | Lanco FCU | 113 |
| 2 | Limestone Financial CU | 46 |
| 3 | Heritage USA FCU | 39 |

2026 ANNUAL REPORT

EMPOWERING MINDS. STRENGTHENING COMMUNITIES.

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150 M - 499M



MOST STUDENTS

Reached

1	Topside FCU	7,259
2	LOC Credit Union	5,682
3	Extra Credit Union	5,638



MOST ADULTS

Reached

1	Henrico FCU	874
2	Park View FCU	652
3	CSE FCU	552



MOST STUDENT PRESENTATIONS

Delivered

1	LOC Credit Union	229
2	Extra Credit Union	224
3	Topside FCU	199



MOST ADULT PRESENTATIONS

Delivered

1	Henrico FCU	92
2	CSE FCU	40
3	HomeTown CU	32

2026 ANNUAL REPORT

EMPOWERING MINDS. STRENGTHENING COMMUNITIES.

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500M - 999M



MOST STUDENTS

Reached

- 1 Wasatch Peaks Credit Union 11,100
- 2 TRUE Community CU 10,660
- 3 TLC Community CU 10,369



MOST ADULTS

Reached

- 1 Financial Center First CU 8,450
- 2 TLC Community CU 1,445
- 3 Diversified Members CU 1,278



MOST STUDENT PRESENTATIONS

Delivered

- 1 TRUE Community CU 667
- 2 TLC Community CU 289
- 3 PFCU 233



MOST ADULT PRESENTATIONS

Delivered

- 1 Financial Center First CU 240
- 2 Diversified Members CU 35
- 3 TRUE Community CU 28

2026 ANNUAL REPORT

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1B - 10B



MOST STUDENTS

Reached

- 1 Michigan State Univ. FCU 23,391
- 2 Valley Strong CU 20,572
- 3 Tinker FCU 18,506



MOST ADULTS

Reached

- 1 Tinker FCU 17,023
- 2 Virginia CU 9,981
- 3 BayPort 8,191



MOST STUDENT PRESENTATIONS

Delivered

- 1 Michigan State Univ. FCU 1,105
- 2 Tinker FCU 719
- 3 ELGA CU 567



MOST ADULT PRESENTATIONS

Delivered

- 1 Tinker FCU 487
- 2 Virginia CU 382
- 3 Michigan State Univ. FCU 327

2026 ANNUAL REPORT

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Above 10B



MOST STUDENTS

Reached

- 1 State Employees' Credit Union 118,165
- 2 SchoolsFirst Federal CU 28,998
- 3 VyStar Credit Union 20,897



MOST ADULTS

Reached

- 1 State Employees' CU 26,298
- 2 Schools First Federal CU 25,235
- 3 Wings Credit Union 7,002



MOST STUDENT PRESENTATIONS

Delivered

- 1 State Employees' CU 1,902
- 2 SchoolsFirst Federal CU 1,118
- 3 VyStar CU 690



MOST ADULT PRESENTATIONS

Delivered

- 1 Schools First Federal CU 1,260
- 2 State Employees' Credit Union 920
- 3 Wings Credit Union 382



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 **GreenPath.**
financial wellness

 **Dream**

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 **TransUnion.**



CUFEN
Credit Union Financial Education
NETWORK

CUFEN 2026

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OF FINANCIAL EDUCATION.

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★ **SILVER SPONSOR** ★

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TOP 5 STATES

ADULTS REACHED

1	California	50,244
2	Michigan	29,546
3	North Carolina	26,479
4	Virginia	20,588
5	Oklahoma	17,023



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Credit Union Financial Education
N E T W O R K

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TOP 5 STATES

ADULT PRESENTATIONS

1	California	2,043
2	Michigan	1,244
3	North Carolina	930
4	Virginia	681
5	Oklahoma	487



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Credit Union Financial Education
N E T W O R K

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TOP 5 STATES

STUDENTS REACHED

1

North Carolina

118,165

2

Michigan

92,784

3

California

80,424

4

Florida

40,514

5

Virginia

33,121



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Credit Union Financial Education
N E T W O R K

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TOP 5 STATES

STUDENT PRESENTATIONS

1	Michigan	4,271
2	North Carolina	1,902
3	California	1,811
4	Florida	1,325
5	Minnesota	920



CUFEN

Credit Union Financial Education
N E T W O R K

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2026 REPORTING TOTALS



REPORTING
CREDIT UNIONS 97



TOTAL ADULTS
REACHED 200,554



TOTAL ADULT
PRESENTATIONS 8,391



TOTAL YOUTH
REACHED 564,941



TOTAL YOUTH
PRESENTATIONS 16,171

LEGACY IN MOTION A W A R D

— IN HONOR OF —

Trysh Olson



“ STRONG WINGS.
STRONG LEADERSHIP. ”

PRESENTED ANNUALLY BY
CREDIT UNION FINANCIAL
EDUCATION NETWORK

2026 ANNUAL CONFERENCE



Step Up! Make an Impact

Your Skills | Your Passion | CUFEN's Future



We can't do
it without
people like
YOU!

Join one of our committees and
help shape the future of CUFEN!



Leadership & Nominations Committee

Help by identifying emerging leaders, supporting the Board of Directors, coordinating nominations and awards, and recognizing excellence across our network.



Events & Engagement Committee

Help plan and support engaging events, educational opportunities and programming for our members.

Interested?

Tell us where you'd
like to get involved!

SCAN
ME! >>



