

CU Strategic Planning

Chuck Cockburn President & CEO

*Strategist
Financial Genius
Humoritarian*



Chuck's 25-year CEO track record (and 40 in the business) has been to profitably grow credit unions while significantly improving service and morale. The legacy he's left at credit unions from coast to coast has been to create a foundation for long-term success.

Chuck's consistent mastery of "the turn-around" at credit unions he's touched is the reason the founder of Credit Union Strategic Planning recruited him. When the boards of Hudson Valley and Digital Credit Unions needed the best, they hired Chuck - and his team built a foundation for long-term success. Today, long after his departure, these credit unions are multi-billion dollar, thriving organizations. His precise moves are more than good instincts. His 12 years at NCUA as director of statistics resulted in a mastery of understanding and evolving the credit union balance sheet.

His talent for achieving significant organizational improvements is unsurpassed. His work on process improvement, culture development and creating a competitive advantage has been recognized by the Filene Research Institute (The Watermark Credit Union Experience) and the World at Work Journal (Scanlon Principles and Processes: Building Excellence at Watermark Credit Union). While he doesn't believe in individual awards, his credit unions consistently have been recognized as Best Places to Work in their communities. Chuck provides excellent fiscal, strategic, and operational leadership and is accomplished at driving employee

engagement, management and board partnership. Chuck's success is about more than just numbers; he has been recognized for coaching and developing a senior team, with eight prior direct reports having become credit union CEOs.

Chuck is the president of Credit Union Strategic Planning, leading the organization's Net Worth Restoration, Mergers, Board Governance and Small Credit Union CEO Mentorship Programs.

Speaker Topics Include:

- **Successful merger strategies: Six steps to attracting the right partner for the right reasons**
- **Net worth improvement: Building a foundation for long-term success**
- **Effective board and CEO partnership**
- **Profitability 101: Understanding the components of credit union profitability**