

For Immediate Release:

Announcing the 2022 Top Directors in Credit Unions

Winners Announced at the PROCU Convention in Laguna Beach, CA

CHAPEL HILL, NC, OCTOBER 24, 2022: The winners of the 2022 Top Directors Awards in the credit union category were announced during an award ceremony held October 4, 2022, at the PROCU Annual Convention in Laguna Beach, California. The 2022 Top Directors in credit unions are:

1. CCU Wealth Strategies, Nick LaPuma
2. Elements Wealth Management, Matthew Snively
3. Addison Avenue Investment Services, Scott Jenner
4. Northwest Financial Advisors, Karen Benedict
5. Steward Concepts, Matthew Griffin

Tim Kehrer and Arthur Osmond, Principals of Kehrer Bielan, facilitated the awards ceremony. Winners were announced by the presenting sponsor of the 2022 Top Director Awards, Ameriprise Financial Institutions Group, represented by Chris Melton, National Director— Institutional Business Development, and by Kevin Mummau from CUSO Financial Services/ Sorrento Pacific Financial, who sponsored the credit union category.

“It is always a great honor to present these awards in recognition of greatness in the delivery of investment services,” commented Kehrer. “I would like to express our sincerest gratitude to Ameriprise Financial Institutions Group for their sponsorship of the 2022 Top Directors Awards and CUSO Financial Services/Sorrento Pacific Financial as sponsor of the credit union category, and also to the hundreds of credit unions that participate in our annual benchmarking survey, without whose support these awards would not be possible.”

Kehrer Bielan considered 177 nominees in the credit union category and selected 10 finalists from that group for consideration for an award. The finalists and winners were chosen based on a transparent, data-driven process that rewarded for the performance of the Director’s firm across 13 key criteria.

“I’m honored to be representing Ameriprise Financial Institutions Group as presenting sponsor of this year’s Top Directors Awards,” said Melton, National Director—Institutional Business Development for Ameriprise Financial Institution’s Group. “Congratulations to all of this year’s nominees and finalists for their exceptional success, and in particular the Top Director winners for their distinguished efforts in driving growth to the financial institutions that they support.”

“It is sincerely a distinct pleasure to sponsor and recognize the top directors in the credit union category. These professionals represent the best of the best in our industry and have demonstrated the leadership it takes to achieve outstanding results,” said Kevin Mummau from CUSO Financial Services/Sorrento Pacific Financial. “Our congratulations to all the nominees, finalists, and this year’s winners. We applaud your achievement.”

Ameriprise Financial, Inc. and its affiliates are not affiliated with the third-party companies mentioned, their representatives, or the award recipients.

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