

The background of the slide is a grayscale photograph of a mountain range. The mountains are layered, with the closest peaks in the foreground and more distant, hazy peaks in the background, creating a sense of depth. The lighting is soft, suggesting a misty or foggy day.

**“Advising highly ambitious credit unions  
that want to change the world.”**

# Services

*George Hofheimer provides advisory services to credit union and industry support organizations.*

**STRATEGY DEVELOPMENT:** to advance an organization's strategy in concert with their executive and governance leadership teams. Specific areas of focus within this domain include:

- > Strategy Reset, *a multi-year process whereby the organization creates a completely new strategy.*
- > Strategy Evaluation, *a method for stress testing and strengthening the organization's existing strategy.*
- > Strategy Implementation, *a resource to assist the organization with communication, buy-in and understanding of the strategy.*

**FACILITATION:** guide organizations' strategic discussions to ensure effective outcomes for high stakes discussions and decisions.

**EXECUTIVE COACHING:** provide leadership and performance coaching for executives and high potential staff.\*

**INSIGHT SHARING:** create and conduct sessions for a variety of audiences on relevant industry topics.

\* In Fall 2024, will complete a certification and licensure program through Brown University in Fall 2024. Additionally, partnering with Humanidei on a CEO readiness program called "HumanEdge" launching in 2024.

# About

*George Hofheimer is a sought after advisor to the credit union industry.*



George Hofheimer has nearly 30 years experience advising the consumer finance industry. George was the head of research and development at Filene Research Institute, the credit union industry's think tank for 15 years. Previously he was the chief learning officer at CUES, the credit union industry's leading executive education association, for 8 years. He has conducted hundreds of advisory engagements with consumer finance organizations across the globe and authored dozens of research reports, including a book entitled [Banking on a Human Scale](#). George began his career in international business development, including as a member of the first group of Peace Corps Volunteers in the former Soviet Republic of Uzbekistan. George obtained his MBA from the University of Wisconsin-Madison. He is passionate about raising awareness to reduce the financial and mental burdens of medical debt on American consumers having completed two Trans-American bicycle tours resulting in over \$4 million of donations to consumers and non-profit organizations.

# Advisory Strengths

*Based on personal feedback from my client base, these are the attributes you can expect from me.*

**Inside Industry Expertise, Outside Perspectives:** Unrivalled depth of understanding of the cooperative financial system: its strategic, operational and regulatory context and its people, organizations and systems. At the same time, I bring perspectives from outside the client's organization to push the boundaries of what's possible.

**Real World Outcomes:** Expert at translating a client's needs, leading the work and collaboratively delivering an impactful and practical outcome for their organization.

**Translating the Complex into Action:** Spends significant time to identify the crux of a strategic issue, coalesce around that issue with the client and take action to change the organization's current situation.

**Flexibility and Adaptability:** Focus is on outcomes, not process. Templates are rarely, if ever, used. Instead the client needs, timelines and capabilities are paramount in crafting an approach.

**Confidentiality and Trust:** Always delivering high value, on budget and on time with the highest level of discretion.

# Client List

*Since 2021, George Hofheimer has worked with the following clients.*

## **CREDIT UNIONS**

Chartway FCU (VA/UT)  
Summit Credit Union (WI)  
Sandia Laboratory FCU (NM)  
Vantage West Credit Union (AZ)  
Golden 1 Credit Union (CA)  
Veridian Credit Union (IA)  
Community Financial CU (MI)  
Wright-Patt Credit Union (OH)  
Redwood CU (CA)  
Digital FCU (MA)  
Service FCU (NH)  
GreenState Credit Union (IA)  
America First CU (UT)  
Together Credit Union (MO)  
Dupaco Credit Union (IA)  
Municipal Credit Union (NY)  
Everwise Credit Union (IN)  
VyStar Credit Union (FL)  
WSECU (WA)  
Civic FCU (NC)

## **CREDIT UNIONS (cont.)**

Coastal FCU (NC)  
Members Cooperative CU (MN)  
Christian Financial CU (MI)  
Canvas Credit Union (CO)  
SCE FCU (CA)  
Resource 1 Credit Union (TX)  
Clean Energy FCU (CO)  
TopLine FCU (MN)  
1st Bergen FCU (NJ)  
Express CU (WA)  
Georgetown FCU (DC)

## **CUSOs**

Credit Union Student Choice  
Member Loyalty Group  
Origence  
ServiStar Consulting  
Curql Collective

## **ASSOCIATIONS**

CUNA  
CUES  
NASCUS  
NACUSO  
Go West  
Indiana CU League  
MD I DC CU Association  
Filene Research Institute  
CU DeNovo Collective

## **MISCELLANEOUS**

Callahan & Associates  
Ingka Investments (Sweden)  
FTSI  
State of New Mexico  
Humanidei  
CU Insight  
Swoboda Research (UK)

# Project Examples

*Illustrative samples of client work.*

Led the regional expansion strategy on behalf of a single-SEG credit union.

Evaluated the effectiveness of a \$10 billion + credit union's future corporate strategy.

Recommended an evaluation system for a \$10 billion + credit union's CSR activities

Reset a multi-billion dollar credit union's strategy to focus on the financial needs of women.

Examined the market potential of a FinTech partnership at a statewide credit union.

Coached the CEO of a credit union to develop a more operationally efficient organization.

Rationalized a multi-state credit union's service delivery strategy with a focus on rural community outreach.

Facilitated the expansion and introduction of a spin-off company at a nationwide CUSO.

Conducted and wrote an industry-wide report on the implications of climate change.

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**608.852.4632**  
**george@hofheimer.org**  
**www.hofheimer.org**