

# Pathways

Financial Credit Union

## 2025 Board of Directors Election

The Board of Directors, elected by and accountable to our membership, governs the Pathways Financial Credit Union (Pathways). By focusing on the best interests of the credit union, they are committed to the achievement of our goals and objectives.

As a credit union owner, you enjoy the right (one member, one vote) to vote representatives to the Board and thus participate in decisions affecting the future and direction of your credit union.

This year there are three (3) open positions and five (5) candidates running for the board. You may vote for up to three (3) candidates.

### Ways to Vote

We are pleased to offer three different ways for members to vote. Please choose whichever method is most convenient for you. Remember your vote must be received on or before March 06, 2025 for your vote to be counted.

1. Online by visiting <https://pathwayscu.cuballot.com> or simply scan the QR Code below. You will be asked to provide your member number (available on your statement) and the last four digits of your social security number.
2. Over-the-phone by dialing **1-855-203-5482**. You will be asked to provide your member number (available on your statement) and the last four digits of your social security number.
3. By using the ballot on the back of this announcement.

Your vote is very important. Thank you for taking the time to help guide your credit union!

**Scan QR Code to Vote**



## Pathways Financial Credit Union 2025 Board of Directors Election – Ballot Instructions

1. Cast your vote by placing check marks in the boxes next to no more than three (3) candidates for whom you wish to vote.
2. Enter your member number and sign the ballot below.
3. Mail the completed ballot to CUBallot – Election Processing, P.O. Box 3156, Dublin, OH 43016-9842. Your vote must be received on or before March 06, 2025 to be counted. *Note: No mail ballot shall be valid after the expiration of eleven months after delivery to the credit union.*



### **Kirk Pierson (incumbent)**

Kirk has been a member for over 43 years and has served on the board of directors for the last 21 years. He is retired from American Electric Power after 37 years of service. Kirk served on the credit union's audit committee for 8 years (*as auditor and as chairperson*) and is currently serving on the Community Giving Committee.

Kirk is a graduate from the Ohio State University with a Bachelor of Science in Accounting.

Kirk is active in the community. He has mentored junior high school students, volunteered for the Ohio Wheelchair Games, and most recently has served as a volunteer for Ducks Unlimited and the Port Clinton Elks.

#### **Why are you interested in serving on the Pathways Financial Credit Union Board of Directors?**

*"I have been associated with the credit union for over 40 years - 21 years on the board of directors. Starting as a member, then serving on the Audit Committee (member and chair), and to my current position board liaison for the Community Giving Committee. I (like a lot of the members) personally depend on Pathways for all my financial needs - my home mortgage, auto loans, credit and debit cards. So, I have a vested interest in making Pathways a stronger Credit Union for all of us. I have also been part of Pathways growth - from one branch location to the fastest growing credit union in Ohio, now with 11 branches, 48,000 members in 13 counties. I look forward to serving the members and employees of Pathways with another term on the board."*



### **John C. Falk, Sr. (incumbent)**

John has been a credit union member since 1979. And a board member for over 33 years with 3 different credit unions. John has been Board Chair (of two credit unions) and Treasurer (of two credit unions).

John has a Bachelor of Science Degree in Accounting from the Ohio State University where he was selected to the national business honorary, Bata Gamma Sigma and the national accounting honorary, Beta Alpha Psi. While a student at OSU he was also chosen as a Pace Setter. He holds an MBA in management from Xavier University.

John also volunteers with the Central Ohio Chapter of Society of Fire Protection Engineers serving on its Board as Treasurer since 1982.

John retired from Capital Fire Protection Co. after 45 years of service. He served as CFO for 15 years, CEO for 5 years and Board Chairman for 14 years.

#### **Why are you interested in serving on the Pathways Financial Credit Union Board of Directors?**

*"My original reason for volunteering to serve on a credit union board was to give back to the industry I was employed in. So, I volunteered to serve on the Builders Exchange Credit Union board (The BXC), where I served as board chair. The BXC credit union was small at that time but grew to over \$2M in assets and merged with Western Credit Union in 1990. People Helping People is very important to me and in 1993 I started serving on the Western Credit Union Board (and now the Pathways Board). As board members, we come from a variety of backgrounds. We provide management with our thoughts on good practices and member relations. We are a sounding board for the experts (CEO/President) we hire. I would like to continue to serve our members and provide this input."*

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### Michael Poe (incumbent)

Michael has been a board member since 2016. Michael worked for 15 years in financial forecasting and risk management at American Electric Power and other energy companies. He also uses his experience running a small business to assist the board.

Michael has a Bachelor of Science degree in accounting from Case Western Reserve University.

#### Why are you interested in serving on the Pathways Financial Credit Union Board of Directors?

*"I am passionate about volunteering in support of economic development causes, and I believe my experience in finance and risk management will continue to benefit my fellow members. I appreciate and support Pathways goal to provide efficient and personal banking."*

### Wanda L. Brown



Wanda retired in January 2021 after nearly 23 years of working for the Ohio Department of Jobs and Family Services in the Office of Information Systems, Account Management Section where she was responsible for providing access to the network, analyzing, and evaluating policies and procedures, defining areas of process improvement, collecting data for statistical and auditing purposes, and preparing reports that contained sensitive, confidential, and proprietary information. During my employment, Wanda was a member of the agency's Cultural Change Committee and the Diversity and Inclusion (D&I) Advisory Committee.

Wanda holds a Master's Degree in Human Services and a postgraduate certificate in Diversity Studies.

Wanda is currently the President and Founder of Hope 4 Us Inc. (501C3), a breast cancer organization targeting the underserved and minority community members.

Having been a credit union member since 1999, Wanda is a firm believer of "People Helping People". She never misses an opportunity to introduce her family, friends, and ever strangers to the Credit Union and its mission.

Wanda is actively involved with her church and as a certified Komen's Patient Navigator and continues to promote breast cancer awareness.

In addition, Wanda is a member of the following professional organizations; National Association of Professional Women (NAPW), National Organization for Human Services (NOHS), Toastmasters International, Tau Upsilon Alpha Honor Society, National Council of Negro Women (NKNW) - 2010 Outstanding Community Service Award recipient, Ohio State Cancer Caucus, National Breast Cancer Coalition (NBCC), and Past VP of the Columbus National Association for the Advancement of Colored People (NAACP)

#### Why are you interested in serving on the Pathways Financial Credit Union Board of Directors?

*"I believe in the Credit Union motto of "People Helping People", and I served as Vice-Chair the Board of Directors for the ODJFS Federal Credit Union from 2018 until merging with Pathways Financial Credit Union in 2022. As a member of the Board of Directors, I utilized my leadership and organizational skills to help move the Credit Union forward by providing direction to make the credit union more automated, making it easier for members to access our services, and continuously looking for more future improvements. I was instrumental in ODJFS Federal Credit Union's merger with Pathways Financial Credit Union. I feel that the skills and wealth of knowledge I obtained from previously being on the Board of Directors can be utilized as a member of Pathways' board. I also feel that being a board member will continue to give our members a voice and feel included in decisions that are being made on their behalf."*

*Additionally, as a lifelong learner, I completed over 50+ courses associated with the former CUNA Volunteer Achievement Program. A few highlighted courses include; Credit Union History and Philosophy, Financial Management and Reports, Managing Risk, Asset/Liability Management for Directors, and Understanding Audit Reports."*

### Steve Reynolds



Steve Reynolds has been a dedicated member of Pathways Financial Credit Union since its inception. He played a pivotal role on the Board of Directors during the strategic merger of Members First, Powerco, and Western Credit Unions, which led to the formation of Pathways.

Steve is the President of Pinnacle Associates, a commercial real estate valuation and consulting firm he

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founded in 1994. In addition to his professional endeavors, he serves as an Adjunct Instructor at Columbus State and has guest lectured at other institutions, including his alma mater, The Ohio State University.

A proud graduate of Grandview Heights High School, Steve remains actively involved in his community. He served for 14 years on the Grandview Heights City Council and has participated in numerous community-based boards and committees. Steve is also the President of Grandview Heights Wrestling, a not-for-profit booster group he co-founded in 2015.

**Why are you interested in serving on the Pathways Financial Credit Union Board of Directors?**

*"I am eager to serve on the Board of Directors for Pathways Financial Credit Union because my previous rewarding experiences on the boards of Pathways and Members First have shown me the impact I can make. Pathways' commitment to diversity, education, and community aligns with my values.*

*My extensive knowledge in strategic planning and financial analysis — as well as my involvement in the original merger that created Pathways — will allow me to contribute effectively. I hold Pathways in high regard and proudly recommend it to others for its reliability in meeting the financial needs of my family and my business, and for its consistent support of our community."*

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Member Number (available on your statement): \_\_\_\_\_

Printed Name: \_\_\_\_\_

Signature: \_\_\_\_\_