

Marla Shepard

Executive Leadership



Overview

With over 30 years-experience as President and CEO at a large top performing credit union, Marla brings unique skills and perspective in working with credit unions, nonprofits and small business. Her experience as a board member for a “for profit” public traded company adds a whole other dimension to her experience and expertise. She has extensive knowledge in business strategy, service quality, operations management, mergers, succession planning and political advocacy. Deeply committed to the credit union industry, Marla’s collaborative, open minded, flexible and proactive approach makes her an invaluable resource.

Key Accomplishments

- Consistent history of strong financial performance in the top 20% of credit unions nationwide measured by Raddon Financial Group. Over 11% capital and excellent expense control.
- Successfully completed largest merger of credit unions at the time creating a \$1.8 billion dollar Credit Union. Successfully integrated the Board of Directors, leadership team, staff and membership base.
- Marla created and chaired the most successful PAC in California. She received the Political Advocate of the year from the California Credit Union League three times. She also received the distinguished service award from CCUL.
- She led a collaborative effort to negotiate and implement the transition of all San Diego area credit unions from one ATM network to another resulting in San Diego Credit Unions saving hundreds of thousands of dollars per year. This collaborative effort had never been done before and has not been done since.
- As Chair of the Governance Committee for a very successful publicly traded company, Marla created the first CEO succession plan. She also created and implemented a very successful new board member recruiting process.

Areas of Expertise

- Business Strategy
- Service Quality
- Operations Management
- Merger Strategy
- Political Advocacy
- Succession Planning

Professional Experience

California Coast Credit Union
President & CEO

Jack Henry and Associates
Board Member

First Future Credit Union
President & CEO

Santel Federal Credit Union
President & CEO

Independent Management Consultant
General Manager

Contact

 858.240.5040

 info@customatrix.com

 www.customatrix.com