

SHARETEC Q1 2024

# NEWSLETTER

## EMPLOYEE UPDATES



### QUARTERLY SPOTLIGHT - *KARI*

Kari Rager is our Customer Learning & Experience Manager! She loves Credit unions and their mission! Working at Sharetec gives Kari the opportunity to empower CUs with tools to serve their members more efficiently. Kari recently won a renewal award for being such a caring partner! Read more about it [here](#). Cheers to Kari!

## NEW ADDITIONS TO SHARETEC

We're constantly growing and added some amazing new talent to the Sharetec family this past quarter, including:

Josh Hall  
**Director of Project Management Office**

Jessyka Galow  
**Receptionist, Waco Office**

Sam Czerniak  
**Senior Project Manager**

Andrew Cappiello  
**VP of Professional Services**

Scott Greene  
**Director of Infrastructure**

Jordan Vasen  
**Financial Controller**  
Shayla Maxwell  
**Implementation Quality Analyst**

Sarah Platt  
**Growth Department Intern**

Jonathan Bing  
**Business Analyst**

Teresa Carmouche  
**Core Services Specialist**

Mackenzie Hart  
**Customer Success Support Analyst**

Jessica Joyner  
**Integrated Services Specialist**

Tyler Radlick  
**Integrated Services Specialist**

Elizabeth Sample  
**Core Services Specialist**

Sarah Feldner  
**Customer Success Support Analyst**

## ICYMI

### OPN PARTNERS WITH SHARETEC

OPN and Sharetec partner to deliver instant payments to credit unions!

[READ MORE](#)

### REGIONAL PARTNERS WITH SHARETEC

REGIONAL federal credit union partners with Sharetec to Elevate it Operations & Member Experience!

[READ MORE](#)

# Q1 “SHARETECIVERSARIES”



A big cheers to all the Sharetec customers celebrating an anniversary with us in Q1:

## JANUARY

- Bayou Community FCU
- Cabot Community CU
- County CU
- CSKT Tribal Credit
- Elite Community CU
- Freestone CU
- Genesis Employees CU
- Heights Auto Workers CU
- Joliet Firefighters CU
- Matagorda County CU
- Pioneer Mutual FCU
- River Sallee CU
- Santa FE FCU
- South Texas FCU
- SRU FCU
- Tri-Lakes FCU

## FEBRUARY

- Baraga County FCU
- CAPE FCU
- Central Communications CU
- Central Illinois CU
- CrossRoads Financial FCU
- Evansville Firefighters FCU
- Landmark CU
- Louisiana Catholic FCU
- Loyola University FCU
- Martin County Co-Op CU
- One Thirteen CU
- Progressive Co-operative CU Ltd.
- Teachers CU
- Tippecanoe FCU
- Toledo Teachers' CU
- Valwood Park FCU
- Yantis FCU

## MARCH

- Baker Hughes FCU
- Barbados Teachers' Co-Op CU
- City & County Employees FCU
- CUSA FCU
- Flagship FCU
- Four Corners FCU
- General Employees CU (GECCU)
- Haynes Community FCU
- Iberville FCU
- Indianapolis Post Office CU
- Kankakee Terminal Belt CU
- Latrobe Area Hospital FCU
- Lion FCU
- Natco CU
- P A A C Transit Division FCU
- PBA FCU
- Pompano Beach City Employees
- SCA FCU aka Shenango China
- St. John's CU
- The Communal CU
- Travis County CU
- Waco FCU
- Western Indiana CU

## ANNOUNCEMENT

### 25 Sharetec Cus Signed on to SavvyMoney in 2023



Sharetec, a leading innovator in core processing software, signed 25 credit union partners to SavvyMoney in 2023. Known for being a bold, powerful, and caring partner, Sharetec strives to provide best-in-class integrations like SavvyMoney to its customers.

“Helping members achieve their best financial life is a key differentiator in the credit union industry, and SavvyMoney enables our credit unions’ members to keep a pulse on their financial standing,” stated the CEO of Sharetec, Steffi Decker. “We are enthusiastic to see so many of our partners embracing SavvyMoney to enhance their members’ lives. It’s a powerful tool to help combat today’s financial challenges.”

SavvyMoney provides credit score and financial wellness solutions that integrate seamlessly with various digital banking platforms. SavvyMoney includes comprehensive credit score analysis, full credit reporting, and personalized offers – accessible in one dashboard within online banking.

[READ MORE](#)

## FEATURED PRODUCT



SHARETEC ADVANCED ANALYTICS:

[WATCH NOW](#)

# ANNOUNCEMENT

## Sharetec Keeps Growing with New Key Management Hires

As your caring partner, it is our job to ensure that you have access to both best-in-class software *and* best-in-class support. In order to provide you with the tools you need to be successful and competitive, we've been adding new A-players to our management team. Meet some of the newest members of the Sharetec family that will be assisting you in accelerating your credit union operations.



### **ANDREW CAPIELLO, *VP OF PROFESSIONAL SERVICES***

As the VP of Professional Services, Cappiello will be combining strategic thinking, client management, and operational expertise to deliver an exceptional customer experience and drive credit union business and growth. Cappiello will play a major role in new and existing customers' lifecycles with the Sharetec software.

Cappiello says he "...envisions the PS group as the heartbeat of that operation. We have the pulse on all new customers coming on board and are providing a best-in-class experience to get the customer set up with the product(s) they purchased. He continued, "The idea is that every customer leaves the PS interaction prepared and excited by the experience."

Cappiello is an experienced Professional Services leader with a demonstrated history of working in SaaS. His previous roles included Director of Professional Services at WalkMe™ and management roles in Implement at Paycom. Cappiello is a graduate of SUNY Cortland and also holds a Lean Six Sigma Green Belt Certification.



### **JOSH HALL, *DIRECTOR OF PMO***

Hall knows something about the credit union industry, having been a CEO/CFO at Meridian Credit Union and a former Sharetec client. As the Director of Project Management Office, Hall oversees Sharetec's team of project managers, all of whom are accountable for various projects, including conversions, software migrations, and any additional projects that require implementation.

When asked what he hopes to accomplish at Sharetec, Hall stated that he wants to "...create and carry out an implementation process that delivers a great customer experience for the client." His 16+ years in the credit union industry provide him with key knowledge and insight on how credit unions operate, their mission, and how they strive to improve the financial well-being of their members. His focus for his team is to provide a great customer experience, in conjunction with an innovative software product, to help credit unions achieve their mission.



### **JORDAN VASEN, CPA, *CONTROLLER***

Vasen is taking the reins of the Sharetec Financial Department as Financial Controller. Her hope and vision is for finance also to be the organization's heartbeat and an incredible partner to all the groups that make up the Sharetec family.

Vasen comes to Sharetec with an impressive background in accounting, bringing a wealth of knowledge and skills that will contribute to Sharetec's success. Before joining Sharetec, Vasen held an array of accounting and finance-related positions, most notably as Controller at Omatic, as well as Senior Accountant for Zillow. Vasen is a graduate of the University at Wisconsin-Madison and is a Certified Public Accountant (CPA).



### **SCOTT GREENE, *DIRECTOR OF INFRASTRUCTURE AND SECURITY***

Greene joins the Sharetec family as our new Director of Infrastructure and Security. In his role, Greene will be leading IT Services, DevSecOps, and the Security teams. By understanding company goals and aligning teams around initiatives, Greene believes he'll help Sharetec continue to succeed.

With over 10 years of experience in systems administration and nearly 5 years in management, Greene hopes to help lead Sharetec in the right direction to continue achieving its goals.

## 2024 SHARETEC USERS CONFERENCE

**REGISTER  
For 2024!**

This year's Users Conference will take place  
September 8 – 11, 2024 in Frisco, Texas!

