

A message from our CEO

I'm pleased to announce an important update that highlights our commitment to efficiency. Following this issue, we will be discontinuing the Quarterly Dividend newsletter. This change means we'll no longer be producing over 240,000 copies annually.

Rest assured — keeping up with our latest updates will still be easy. You can stay informed through our website, social media channels, and email notifications.

Critical information, including compliance and regulatory updates as well as communications from our Board of Directors, will be delivered as statement inserts available in both print and electronic formats, based on your settings. This approach will ensure timely and effective communication while helping us reduce waste and costs, ultimately delivering even greater value to you.

We recognize the importance of this transition and are committed to making it as seamless as possible. Our aim is to continue providing high-quality content while improving our efficiency.

Thank you for your understanding and support as we move forward with this new direction.

Be well,



Kelly M. Botti
Chief Executive Officer



Stay in the know with what's happening at TruMark Financial

You can stay up-to-date with the latest news and events happening at TruMark Financial by visiting us online at trumarkonline.org, following us on social media, and by signing up to receive our emails!

Website

Find all the current promotions, helpful tips, and even current events at trumarkonline.org

Social media

Follow us on [Facebook](https://facebook.com/trumarkonline) (trumarkonline), [Instagram](https://instagram.com/trumarkfinancial) (trumarkfinancial), and [LinkedIn](https://linkedin.com/company/trumark)

Emails

Add your email address to your account information via online banking or by calling 1-877-TRUMARK in order to receive TruMark Financial emails



Member support made easy with our Virtual Advisors

Connecting with our Virtual Advisors provides convenient access for support. Just click the "Let's talk" button on our website and choose one of the following:



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For the texter in all of us*



Video chat

You'll see us, but we won't see you



Audio chat

Speak through your device



Phone call

Enter your number, and we'll call you

*Direct number for text chat: 267-762-1267

Please note: Do not include personal account information such as: Member Number, Social Security number, or other sensitive information.



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TruMark Financial Wealth Advisors can help provide tailored financial strategies that align with your unique circumstances and future goals. By personalizing your financial plan to adapt to both market fluctuations and changes in your personal life, you can feel confident you're on the right path.

TruMark Financial Wealth Advisors can help with:

- Financial planning
- Retirement planning
- Wealth transfer and legacy planning
- Education planning
- Account/portfolio reviews
- Trust planning and services
- Investment strategies

Schedule a complimentary consultation today

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Not Credit Union Deposits or Obligations	May Lose Value

TruMark Financial 2025 Election Procedures

Dedicated to its members, who are also its owners, TruMark Financial Credit Union is overseen by representatives of its membership. New officials are elected in accordance with the procedures stipulated in the credit union's bylaws.

Accordingly, any member who meets election bylaw requirements and wishes to submit their name as a candidate to the Nominating Committee, in care of the credit union, must do so in writing by November 1, 2024. The submission must be accompanied by a biography (less than 75 words) and a certificate stating the candidate is agreeable to the nomination and will serve if elected.

Should there be no contest, nominees to the TruMark Financial Credit Union Board of Directors and Supervisory Committee would be elected by acclamation at the credit union's annual meeting on March 27, 2025.

Election schedule

November 1, 2024

Deadline for candidate name submission to the Nominating Committee

February 15, 2025

Deadline for filing nominations by official petition with the Secretary of the credit union

February 20, 2025

Secretary of the credit union posts all nominees' names in each office

February 25, 2025

Ballots mailed, if necessary, to members eligible to vote

March 22, 2025

Deadline for ballot submission, if necessary, to the Tellers of the Election

March 27, 2025

Annual meeting, 7 p.m.
TruMark Financial Credit Union
335 Commerce Dr.
Fort Washington, PA 19034



Holiday closings:

TruMark Financial will be closed in observance of the following holidays:

Columbus Day

Sunday, October 13, and Monday, October 14

Veterans Day

Sunday, November 10, and Monday, November 11

Thanksgiving Day

Thursday, November 28

Christmas Eve

Tuesday, December 24, closing at noon

Christmas Day

Wednesday, December 25

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Board of Directors

Hugh T. Bray, President
Suzette E. Adams, Vice President
Kathleen L. Wells, Treasurer
R. Terence Brunt, Secretary
Joseph J. Bily, Director
James P. DeBow, Director
Daniel L. Dillard, Director
William Donehower, Director
Leonard V. Doughty III, Director
Wayne J. Goodwin, Director
David A. Rufibach, Director
Richard F. Stipa, Associate Director

Supervisory Committee

Jaclyn Bowman, Chairperson
Richard Lee, Vice Chairperson
Donna M. Carvin, Member

Branch locations

Scan the code to find branch and ATM locations



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Member banking is better banking®



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