

DAVID J OLSON

EXECUTIVE SUMMARY

Dynamic and results-oriented individual with over 25 years of experience in driving operational excellence and enhancing member experience within the financial services sector. A proven track record of leading cross-functional teams to achieve strategic objectives, optimize operational efficiency, and deliver exceptional service. Passionate about employee engagement and member satisfaction. Results-oriented, motivated leader with extensive experience in managing complex, mission-critical operations. Possesses strong interpersonal, motivational, and presentation abilities, coupled with analytical acumen. Servant leader with high EQ that always leads from the heart.

CORE COMPETENCIES

Agile Project Management	Lifelong Learner	Project Management
Budget Management	Leadership & Strategy	Research & Analysis
Change Management	Member Experience Enhancement	Risk Management
Cross-Functional Leadership	Operational Efficiency	Sales Management
Data-driven Decision-making	Process Improvement	Strategic Planning

PROFESSIONAL EXPERIENCE

TRUStage (FORMERLY CUNA MUTUAL GROUP) – MADISON, WI (09/16 – PRESENT)

Senior Manager, 09/16 – Present

- **C-Suite Consulting and Sales:** Led consulting and sales presentations for a variety of products, services, and solutions, leveraging eight years of experience to engage C-Suite executives effectively.
- **Solution Design:** Collaborated closely with Credit Union stakeholders to understand their technical stack and design solutions that enhance both lender and member experiences.
- **Fintech Landscape Insight:** Informed and influenced internal stakeholders on the current state of the Fintech space within the Credit Union landscape, driving strategic decision-making.
- **Product Development and Market Launch:** Predictive Loan Growth, QuoteConnect, Protection Advisor Expert, CCPA Compliance, Retirement and Investment Products
- **Stakeholder Relationship Management:** Managed relationships with various stakeholders, including Compliance, Legal, Marketing, Product, Sales, and Senior Management, to ensure alignment and successful project execution.
- **Product Vision and Roadmap:** Collaborated with Product Management counterparts to align on vision, program backlog, and roadmap, ensuring cohesive and strategic product development.

UW CREDIT UNION – MADISON, WI (08/07 TO 8/16)

Consumer Lending Sales Manager, 04/13 to 8/16

Member Lending Consultant Team Manager, 11/10 to 04/13

Branch Manager, 02/09 to 11/10

Assistant Branch Manager, 02/08 to 02/09

Senior Financial Specialist, 08/07 to 02/08

- Responsible for building out the indirect lending channel, adjusting rate sheet, product development, and business development resulting in a 144% increase from 2013-2016.
- Designed, developed, and led a new outbound calling department in 2011 resulting in over \$180M in consumer loans under my leadership.
- Developed an internal lead filtering system that managed over 136,000 leads annually, which created significant operational efficiencies for our outbound team and the branch network.

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COMMUNITY/ORGANIZATIONAL INVOLVEMENT

- | | |
|---|----------------|
| • Paddy's Paws - Foster Care Parent for 12 dogs | 2022 - present |
| • CUNA Mutual's ULEND Academy Facilitator | 2019 - 2020 |
| • Mount Horeb Dance Team Booster Club Treasurer | 2019 – 2021 |
| • CUNA Mutual's Predictive Loan Growth Training Facilitator | 2017 |
| • UW Credit Union Consumer Lending Training Facilitator | 2008 – 2016 |
| • UW Credit Union Financial Mentor | 2008 – 2011 |
| • UW – Madison BCC Mock Interviewer | 2009 & 2011 |

SPEAKING ENGAGEMENTS

Credit Union Direct Lending Conference – Las Vegas, NV

The Holy Grail of Indirect Lending

May 13th, 2014

EDUCATION

Master of Business Administration (MBA)

Expected Completion: 2025

Louisiana State University - Shreveport

Bachelor of Science - Public Administration

Upper Iowa University

Cum Laude - GPA 3.53