



Dear Applicant:

Thank you for your interest in serving as a Volunteer Official for Redwood Credit Union (RCU). Attached are the following:

- Application to Serve as a Credit Union Volunteer Official
- Duties and Responsibilities as a Volunteer Official
- Sample Candidate Statement
- RCU Code of Ethics
- Credit/Criminal Background Check Authorization Form
- Nominating Petition

RCU Members may seek election to open positions for RCU's Board of Directors via one of the following methods:

- **Application:** Any Member 18 years or older may apply for nomination by submitting the enclosed "Application to Serve as a Redwood Credit Union Volunteer" to the Nominating Committee. All applications and candidate statement information must be received no later than **5:00pm Friday, February 6, 2026**. Please be aware that the application process *does not* guarantee an applicant's nomination. The final decision rests with the Nominating Committee.

Current and former employees (within the past 5 years), and members of the immediate family of a current or former employee, are deemed by the credit union to have an inherent and unavoidable conflict of interest. For that reason, such persons will not be eligible to serve as a volunteer.

- **Nomination by Petition:** Any Member 18 years or older may be nominated by obtaining the signatures of at least 257 RCU Members on the enclosed "Nominating Petition." All petitions and candidate statement information must be received no later than **5:00pm Friday, February 6, 2026**. Submission of a valid petition guarantees the applicant's inclusion as a candidate.

Applications and petitions are to be submitted via one of the following:

- Email (preferred): RCUAnnualMeeting@redwoodcu.org
- Physical mail, addressed to: Redwood Credit Union, Attn: Nominating Committee, PO Box 6104, Santa Rosa, CA 95406-0104

RCU's Nominating Committee will review all applications and may contact candidates for an interview before completing the nomination process.

RCU's Annual Membership Meeting and Election will be held on Thursday, April 23, 2026.

Thank you again for your interest in becoming a Volunteer Official for Redwood Credit Union. If you have any additional questions regarding the application or petition process, please contact RCU's Nominating Committee at one of the addresses above.



**Application to Serve as a Volunteer Official
for Redwood Credit Union**

I am (check all that apply):

- ☐ a current Member of Redwood Credit Union, Last 4 digits of Account # _____
- ☐ at least 18 years of age
- ☐ not a current employee of Redwood Credit Union, nor have I been employed by Redwood Credit Union in the past five years
- ☐ not within the immediate family of a current employee of Redwood Credit Union, and no one within my immediate family has been employed by Redwood Credit Union in the past five years

Contact

Name _____

Address _____ Home Phone _____

City, State & Zip _____ Mobile Phone _____

Email _____

Employment- If retired, please provide your last employment information prior to retirement

Employer _____ Supervisor's Name _____

Address _____ Business Phone _____

City, State & Zip _____ Date Hired _____

Title & Occupation _____

Primary Duties _____

Education - Please provide school name, city & state, dates attended and course of study

High School _____

College/University _____

Other _____



Redwood Credit Union Membership

Do you know of any reason why you would not continue to be a Member of Redwood Credit Union during the next three years?

Community Service

Do you now or have you ever held a position with:

Any other credit unions?

- ☐ Yes (*If yes, please complete the below section*)
☐ No

Credit Union Name _____ Position _____ Dates _____

Reference _____ Phone _____

Description of duties, responsibilities, or experience _____

Any other financial institutions?

- ☐ Yes (*If yes, please complete the below section*)
☐ No

Name of Organization _____ Position _____ Dates _____

Reference _____ Phone _____

Description of duties, responsibilities, or experience _____

Any service clubs? (youth, church, volunteer, civic, etc.)

Please provide name of organization, location, position held, duties and dates

1. _____

2. _____

3. _____

4. _____



Personal Statement

Why do you wish to become a volunteer for Redwood Credit Union?

How do you feel you can contribute to the Credit Union?

References

Name _____ Association _____

Address _____ Phone _____

City, State & Zip _____

Name _____ Association _____

Address _____ Phone _____

City, State & Zip _____

Authorization to Obtain Credit Report and/or Criminal Background Check

Please be advised that in connection with your application for a Volunteer Official position with Redwood Credit Union (RCU), we may obtain either or both of the following reports:

- 1) A consumer credit report from a reputable credit reporting agency.
- 2) A criminal background check from *ESR* (Employee Screening Services), which may include information obtained from a search of public records as well as information about your character and general reputation.

You can request a complete and accurate disclosure of the nature and scope of the investigation; we will provide it to you within five business days after you request it.

☐ Please check this box if you would like to receive a copy of either of these reports if we obtain them.

By signing below, you authorize Redwood Credit Union to obtain a consumer credit report and/or a criminal background check.

Signature _____ Date _____



Certification

I certify that the information in this application and any attachments hereto are true and correct and I authorize you to investigate and verify any of the information.

I authorize you to gather whatever employment and credit information you consider necessary and appropriate.

I authorize you to contact the references listed on this application and I authorize those references to share any information about me you consider relevant to the application and nomination process.

I authorize you to perform a criminal background check on me as you consider necessary and appropriate. If nominated and elected, I agree to abide by the attached Redwood Credit Union *Code of Ethics*.

I understand that you will retain this application whether or not I qualify for nomination, with the understanding that it will be held in the strictest confidence.

Signature_____Date_____

Candidate Statement Required

Please attach a candidate statement of not more than 250 words describing your experience and background related to becoming a Volunteer Official for Redwood Credit Union. Your candidate statement will be used to communicate qualifications and reasons for candidacy to the membership of Redwood Credit Union for voting purposes. A sample statement is provided below for your reference:

Sample Candidate Statement

James Wheeler is currently employed by Acme Engineering, where he has been the Chief Operations Officer for the past ten years.

Mr. Wheeler received his bachelor's degree in Civil Engineering from the University of California at Davis. Aside from volunteering his time to benefit Habitat for Humanity and United Way, Mr. Wheeler has served on the Board of Directors for several local organizations including the Sonoma County Hispanic Chamber of Commerce and the Volunteer Center of Sonoma County. Other organizations Mr. Wheeler has been involved with include the Salvation Army and the Sonoma County Council on Aging.



REDWOOD CREDIT UNION CODE OF ETHICS

A Credit Union is a Member-owned, not-for-profit cooperative thrift institution for the purpose of encouraging savings by offering a good return, using collective monies to make loans at competitively low interest rates to Members and providing other Member services on a cooperative basis. Members are united by a defined field of membership and democratically operate the Credit Union under state and federal law and regulation.

Redwood Credit Union is committed to integrity and ethical business practices. Fulfillment of our Vision, Mission, and Values depends upon the ethical treatment of our Members, volunteers, team members, and communities. In keeping with this philosophy, Redwood is committed to the highest standards of responsibility and conduct will adhere to the following standards.

Honesty & Ethical Conduct

We will act with the highest degree of integrity, managing Redwood in an honest and ethical manner, consistent with our Service Standard of "We Will Do the Right Thing" and our value of "Act with Integrity". We will provide Members with timely and accurate information regarding the financial conditions, operations, and services of Redwood. Information that is false, misleading, or would otherwise lead our Members, volunteers, team members, or communities to mistrust Redwood, should never be issued.

Personal Conduct & Team work

We will maintain a positive and professional working environment in which Officials and team members are treated with trust and respect. We will operate as a team to provide innovative and flexible solutions. We will manage Redwood to ensure diverse ideas are considered and will support management decisions in a unified manner.

Confidentiality

We understand that we have been entrusted with our Member's confidential information and we will maintain controls to protect that information from improper disclosure to others. We will only share Member information with outside parties when allowed by the law and operationally necessary. When Member information is shared with outside parties, the information will be limited to only that which is absolutely necessary.



DUTIES AND RESPONSIBILITIES OF REDWOOD CREDIT UNION VOLUNTEER BOARD OF DIRECTORS

The Board of Directors is responsible for directing and controlling the affairs of the Credit Union. Directors are elected to fill three-year terms and they are expected to contribute approximately 15 to 20 hours per month in service to the Credit Union.

NOMINATION BY PETITION

INSTRUCTIONS:

Candidates submitting an application are subject to nomination by the RCU Nominating Committee. To guarantee nomination by petition, the petition below must be completed with the hand-written, printed name, signature and account number (*last four digits of account number only*) of at least 257 valid Members of Redwood Credit Union.

Completion of the nomination by petition process guarantees a candidate's inclusion on the election proxy. To complete the nomination by petition process, a completed **Application to Serve as a Credit Union Volunteer, Candidate Statement, and Petition** must be submitted as stated in the cover letter of this election packet.

SIGNATURES OF REDWOOD CREDIT UNION MEMBERS:

The undersigned Members of Redwood Credit Union endorse the nomination of

Nominee Name

to serve on the Redwood Credit Union Board of Directors.

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