

FOR IMMEDIATE RELEASE

Engage fi Launches Executive Affiliate Program: Amplifying Wisdom, Empowering the Future of Financial Services

Tampa, FL – Engage fi, a premier consulting firm guiding financial institutions through transformative growth and technological advancement, proudly announces the launch of its **Executive Affiliate Program** - a visionary initiative designed to infuse the financial services industry with proven leadership and timeless insight.

Bridging Generations of Leadership in a Rapidly Evolving Landscape

Banking and leadership are evolving at the speed of light. In this climate of accelerating innovation and disruption, the voice of experience has never been more essential. Engage fi's Executive Affiliate Program strategically connects clients with some of the industry's most respected, repurposed leaders - those who've weathered storms, built resilient cultures, and driven transformation in real-time.

This initiative elevates the role of these distinguished executives, who are now strategic advisors offering deep, experience-driven perspectives on modern financial challenges. With the industry facing unprecedented shifts, the program ensures that wisdom is not just preserved but actively leveraged.

Meet the Executive Affiliates

Among Engage fi's inaugural Executive Affiliates are:

- **Cathy Pace**, former CEO of Allegacy Federal Credit Union
- **Gene Pelham**, former CEO of Rogue Credit Union
- **John Cassidy**, former CEO of Sierra Central Credit Union

These leaders have been hand-selected not only for their unmatched achievements but for their values, vision, and alignment with Engage fi's commitment to purposeful innovation.

"Each of our Executive Affiliates embodies a legacy of leadership that continues to inspire," said Andres Pasantes, President & COO of Engage fi. "They are not just advisors - they're catalysts for growth, cultural strength, and visionary thinking across the financial ecosystem."

"I was motivated to join the Executive Affiliate Program to support Engage fi's mission of being the most dynamic technology partner for financial institutions. After decades in the financial services industry, I've seen too many well-intentioned tech initiatives fall short, leaving executives and staff

frustrated. I'm excited to help community financial institutions turn technology into a much more productive and satisfying experience," said John Cassidy.

More Than a Program, A Platform for Impact

At its core, the Executive Affiliate Program is about amplifying authentic voices that matter. It's a platform for:

- Sharing actionable leadership wisdom
- Delivering thought-provoking content
- Advising the next generation of financial leaders at all stages of their journey
- Shaping values-based cultures in a changing world
- Tracking emerging industry trends
- Giving back through philanthropy and community mentorship

What sets Engage fi apart is its ability to activate these insights at scale, translating decades of experience into real-time value for clients.

Cathy Pace commented, "In the ecosystem of financial services, this program can create transformative outcomes by drawing on best practices by experienced leaders that foster collaborative innovation, boost reach and efficiency, and enable knowledge sharing... all amplifying results across the industry."

Empowering the Next Generation

Engage fi is deeply committed to fostering the growth of rising leaders. Through direct advisory, collaborative workshops, and curated leadership content, the Executive Affiliates will guide tomorrow's change-makers on:

- Strategic insight and adaptive thinking
- Organizational culture and values-based leadership
- Sustainable innovation and transformation

"When someone retires it doesn't mean they no longer have valuable insights. The experience gained from a career of turning challenges into opportunities can provide valuable context to critical strategic decisions leaders need to make. My mentors and leaders helped mold me into a successful leader and it is my desire to serve the leaders of the future," said Gene Pelham.

About Engage FI

With over 1,500 successful projects completed, the team at Engage fi is a blend of consultants, educators, integrators, and advocates. We are laser-focused on guiding financial institutions through our proven process and enabling them to make informed, timely decisions on vendor relationships so they can change at the speed of the consumer. Engage fi has negotiated over \$3 billion in savings and incentives for our clients. We have a unique approach, and our strategic projects are as unique as the clients we serve. Let's Engage!

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