

STEVE R. SMALLWOOD

GOAL: TO OBTAIN A ROLE AS BOARD MEMBER FOR OMISTA CREDIT UNION. TO ENHANCE MY UNDERSTANDING OF CREDIT UNIONS AND PROVIDE GUIDANCE TO MAINTAIN AND ENHANCE THE FUTURE OF OMISTA CREDIT UNION.

EXPERIENCE

MAY 1982 – OCTOBER 1982

FARMHAND, GRAVELHOAM HOLSTEINS, TAVISTOCK, ON

Worked all aspects of Dairy production, feed production, and breeding on 35 cow tie stall operation.

NOV 1982 – NOV 1984

CLAIMS ADJUSTER, CO-OPERATORS GENERAL INSURANCE CO.

Responsible to investigate, document and settle auto, home and farm claims.

DEC 1984 – JUN 1987

INTERNAL AUDITOR, CO-OPERATORS GENERAL INSURANCE CO.

Responsible to devise, conduct, investigate, document and report on financial and operational audits within the various departments of the company. Self-taught SAS programming to generate reports on all financial and key indicator data within the company.

JUL 1988 – JUN 1991

REGIONAL FINANCIAL ANALYST, CO-OPERATORS GENERAL INSURANCE CO.

Responsible to create, monitor and report on financial and key indicator performance for Eastern Ontario and Atlantic regions. Also, managed the budgeting process to roll up the individual departments into one large region budget. Created the financial and key indicator reporting format still in use today throughout the finance and budget departments.

JUL 1991 – APR 1995

SALES SUPERVISOR, CO-OPERATORS GENERAL INSURANCE CO.

Responsible to recruit, train, motivate, and work with new and existing sales advisors to meet sales quotas and deliver superior service to clients and internal departments. Assisted District Manager to develop sales quotas and conduct performance reviews with advisors.

MAY 1995 – APR 2003

DISTRICT MANAGER, NB/PEI CO-OPERATORS GENERAL INSURANCE CO.

Rolled out our independent financial advisor SR4 converting successful employee advisors to independent contractor agencies. Responsible to recruit, train, motivate, and work with new and existing sales advisors to meet sales quotas and deliver superior service to clients and internal

departments. Responsible to manage \$100 M plus of revenue and expenses within a prepared budget. Created sales targets and conducted performance reviews with advisors. Required to terminate advisors for non-production or ethical reasons.

MAY 2003 – DEC 2005

DISTRICT MANAGER, CENTRAL ALBERTA CO-OPERATORS GENERAL INSURANCE CO.

As above.

JAN 2006 – DEC 2014

DISTRICT MANAGER, OTTAWA, ON CO-OPERATORS GENERAL INSURANCE CO.

As above.

JAN 2015 – DEC 2022

DISTRICT MANAGER, NB/PEI CO-OPERATORS GENERAL INSURANCE CO.

As above.

JAN 2015 – DEC 2022

RETIRED

APRIL 2024 – MARCH 2025

DIRECTOR AT LARGE – OMISTA CREDIT UNION

APRIL 2025 – MARCH 2026

DIRECTOR – OMISTA CREDIT UNION

EDUCATION

JUNE 1977

HIGH SCHOOL, FREDERICTON HIGH

APRIL 1982

BSC, UNIVERSITY OF GUELPH, ON

APRIL 1985

ASSOCIATE OF THE INSURANCE INSTITUTE (12 COURSES)

JUNE 1991

CERTIFIED GENERAL ACCOUNTANT (CGA)

SEPT 2003

LUATC DESIGNATION - FINANCIAL PLANNING WITH FOCUS ON LIFE INSURANCE

JUNE 2001

MUTUAL FUND

NUMEROUS COURSES ON LEADERSHIP, MANAGEMENT, FINANCIAL PLANNING, AND PRESENTATION SKILLS, ETC.

SKILLS

- LEADER
- CREATIVE
- PRESENTATION
- ANALYTICAL
- DECISIVE
- COURAGEOUS
- MARKETING
- PROBLEM SOLVING

ACTIVITIES

Big Brother's – as a fundraiser and as a big brother

Youth Impact – Team captain for Co-operators to raise funds for homeless/troubled youth in Moncton

Board of Director's

Moncton and area chapter of CGA – 1993 – 2000

Goldeye Foundation, Central Alberta – 2003 to 2005 - co-operative foundation at the foothills of the Rockies owned by Co-operators, Credit union central of Alberta and UFA Co-operative set up to provide a youth co-operative training facility.

CECNB – 2016 to present. Past president of board. Limited engagement presently.