

# Ana E. Fonseca

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## Professional Summary

Strategic and results-driven executive with over 39 years of experience in the financial services industry, primarily in the credit union industry. Proven expertise in leadership, financial management, strategic planning, and operational efficiency. Passionate about driving organizational success, enhancing member experience, providing member value and fostering a culture of service and integrity.

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## Core Competencies

- Strategic Leadership & Vision
  - Financial Management & Analysis
  - Operational Efficiency & Growth
  - Risk & Compliance Oversight
  - Member Experience Enhancement
  - Stakeholder & Board Relations
  - Organizational Culture Development
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## Professional Experience

### Logix Federal Credit Union

#### President & CEO

*Jan 2019 – Present* | Valencia, CA

- Lead the organization's strategic vision and operational execution, ensuring sustainable growth.
- Drive innovation in member services, financial performance, and operational efficiencies.
- Cultivate a strong corporate culture based on integrity, service, and teamwork.

#### Executive Vice President - Chief Operating Officer

*Jan 2018 – Dec 2018* | Burbank, CA

- Oversaw revenue growth strategies and member experience initiatives.
- Managed branches, sales, and loan fulfillment channels.

## **Executive Vice President - Chief Financial Officer**

*May 2002 – Dec 2017 | Burbank, CA*

- Led lending operations and financial management functions.
- Implemented strategic financial initiatives to support organizational goals.

## **Southland Credit Union**

### **Chief Financial Officer**

*May 2000 – Apr 2002 | Downey, CA*

- Managed all financial management functions, including budgeting, ALM, cash management, and investments.
- Oversaw IT, eCommerce, and card services.

## **Logix Federal Credit Union (formerly Lockheed Federal Credit Union)**

### **Various Positions (Sr. Financial Analyst – Manager, Assistant Controller)**

*Nov 1990 – Apr 2000 | Burbank, CA*

- Managed financial reporting, budget development, and investment portfolio administration.
- Conducted financial analysis, profitability studies, and strategic forecasting.

## **Lockheed Finance Corporation**

### **Revenue Manager**

*Mar 1986 – Oct 1990 | Burbank, CA*

- Supervised A/R functions, income accruals, and financial reporting.
- Maintained relationships with banking partners on a \$145M credit facility.

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## **Education**

### **Stanford University Graduate School of Business**

*Stanford Executive Program – Executive Leadership, 2017*

### **Pepperdine Graziadio Business School**

*MBA, Finance, 2008*

### **University of Phoenix**

*BS Business Administration, 1999*

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## **Board & Community Involvement**

### **Federal Home Loan Bank of San Francisco**

*Board Director (July 2022 – Present)*

### **Henry Mayo Newhall Hospital**

*Board Director (Apr 2022 – Present)*

### **Santa Clarita Valley Economic Development Corporation**

*Board Director (Jan 2019 – Present)*

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