

REV Federal Credit Union Fact Sheet

About Us:

Founded in 1955, REV Federal Credit Union has grown to become one of the largest credit unions in the greater Charleston Metro area with \$650 MM in assets and over 50,000 members. The credit union offers a full suite of products, from savings, checking and investment options to real estate and commercial lending and business solutions.

Leadership:



Jason Lee, President

Lee has over 18 years of professional experience in the financial service industry and is President of the \$650 million Heritage Trust Federal Credit Union in Charleston, SC. Jason Lee formally served as the Executive Vice President / Chief Operations Officer for Orion Federal Credit Union in Memphis, TN for 9 years. At the \$930 million-dollar financial institution, he provided overall strategic direction and strategy; directing financial functions, digital technologies, Retail operations, and was responsible for strategic growth and expansion initiatives.

Prior to joining Orion, Jason was President / Chief Executive Officer at TexasOne Community Credit Union in Houston, TX. During his 6 plus years there, his core competencies were setting overall vision, establishing strategic plans, brand development, and field of membership and branch expansion. His executive leadership provided: nearly doubling the loan portfolio, expansion of five branch locations, developing a business and mortgage services department. Furthermore, Jason began his credit union career as a Credit Union Examiner for the State of Texas, serving as a Senior Financial Examiner.

Jason graduated from Texas Tech University with a B.B.A. degree in Finance and The University of Memphis with an Executive MBA degree. Currently, he serves on the Executive Council for NCR. He formally served on the University of Memphis Executive MBA Alumni Advisory Council as the Chairman, RISE Memphis' Board, ConnectFSS's Innovation Committee and International Children Heart Foundation Board. Additionally, he served on the U.S. Consumer Financial Protection Bureau's Credit Union Advisory Council and Chaired the Payment and Deposits Committee.

Footprint:

REV Federal Credit Union has 10 branch locations that serve members throughout Berkeley, Charleston, Colleton and Dorchester counties. In 2020, the credit union will add its 11th full-service location in the WestEdge development in downtown Charleston. In addition to its full service locations, REV is the only financial institution in the Charleston Metro region to operate student-run branches. These locations are an extension of each schools respective Business and Finance career tracks and are located within the Berkeley and Charleston County School Districts.

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Organizational History:

- 1955** Began operations on the Charleston Air Force Base as Charleston Air Base FCU
- 1977** Installed the first Automated Teller Machine (ATM) in SC.
- 1983** Expanded into Colleton County with the opening of our Walterboro branch location.
- 1985** Changed our name to Heritage Trust Federal Credit Union to expand field of membership.
- 1988** Expanded into Goose Creek & West Ashley with the opening of new branch locations.
- 1995** Expanded into Mount Pleasant with the addition of new a branch location.
- 1996** Expanded into James Island with the addition of a new branch location.
- 2001** Built second Summerville branch location.
- 2005** Welcomed CEO, Jim McDaniel, to the credit union leadership team.
- 2007** Welcomed Chief Development Officer, Emily Reynolds, to the leadership team.
- 2011** Built second Mount Pleasant branch location at the front of Park West.
- 2015** Welcomed Chief Financial Officer, Steve Lattuca, to the leadership team.
- 2019** Welcomed President, Jason Lee, to the credit union leadership team.
Approved as a Community Development Financial Institution.
- 2020** Welcomed new Chief Operations Officer, Tara Smith, to the credit union leadership team.
Rebranded to REV Federal Credit Union.
WestEdge branch grand opening.

Awards and Accolades

- 2018** Mount Pleasant Magazine's Readers Choice Award – Best Credit Union
- 2017** Summerville Chamber of Commerce Large Business of the Year
Dora Maxwell Social Responsibility Award
- 2016** Charleston Metro Chamber of Commerce Trailblazer Award
Summerville Chamber of Commerce Large Business of the Year
Dora Maxwell Social Responsibility Award
Louise Herring Philosophy-in-Action Member Service Award
- 2015** CUNA HR & Organizational Development Council's Excellence Award
Louise Herring Philosophy-in-Action Member Service Award
- 2014** Dora Maxwell Social Responsibility Award

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