



CHARTER OAK NAMES SUSAN SHEPHERD AS NEW MORTGAGE OFFICER Her Industry Experience Includes Longtime Partnership With Local Mortgage Company

FOR IMMEDIATE RELEASE

Contact: Anthony Cronin, AVP-Director of Marketing
860.446.3254
acronin@cofcu.com

Waterford, CT – April 20, 2021 – Charter Oak Federal Credit Union has named Susan Shepherd, an experienced banker with over two decades of lending expertise, as its new Mortgage Officer.

“Susan is well versed in both banking and mortgage lending and her talents will fit nicely with our lending team at Charter Oak,” said Brian A. Orenstein, Charter Oak’s President and Chief Executive Officer. “She’s well-known throughout the mortgage industry and her extensive experience will serve our members well for all their lending needs, from first-time homebuyers to those looking to refinance,” he said.

Shepherd joined Charter Oak in 2018 in its banking operations and is now one of four experienced Mortgage Officers who work with Charter Oak’s lending department serving New London and Windham counties. For 11 consecutive years, Charter Oak has been the Number 1 residential mortgage lender in eastern Connecticut. Since 2010, the credit union has originated almost 11,000 mortgages in both counties combined with a total value of nearly \$1.4 billion, based on annual data compiled by the Massachusetts-based Warren Group’s Residential Mortgage Marketshare Report.

Shepherd has worked in the banking industry for more than 30 years, with 25 of those years dedicated exclusively to providing mortgages for homeowners across eastern Connecticut. For 18 years, Shepherd served as a partner with a local and well-respected mortgage company serving New London and Windham counties. Throughout her career, she has been active with numerous civic and community organizations, including the Chamber of Commerce of Eastern Connecticut, the Greater Mystic Chamber of Commerce, and the Ocean Community Chamber of Commerce. In addition to her work with the local and regional chambers, Shepherd is active with the Eastern Connecticut Association of Realtors, the Habitat for Humanity organization, and the Mystic Rotary Club.

To reach her directly for your mortgage needs, please call 860.235.6346 or send an email to sshepherd@cofcu.com. More information is also available by visiting her website at sshepherd-charteroak.org.

Charter Oak offers an extensive line of mortgage products, including conventional mortgages as well as its popular Accelerator mortgages. In addition, Charter Oak offers first-time homebuyer mortgages and has FHA, USDA, and CHFA mortgages available as well as adjustable rate mortgages. Charter Oak also provides lower-rate mortgages geared toward police officers, teachers, members of the military, and disabled individuals.

Charter Oak is eastern Connecticut’s largest credit union with assets of \$1.4 billion as of December 31, 2020. For more information about Charter Oak’s products and services, please visit any of our convenient branches, call our Contact Center at 860.446.8085 or visit CharterOak.org. Federally insured by NCUA. Equal Housing Lender.

Charter Oak Federal Credit Union is like a bank, just better! We've been proudly serving eastern Connecticut since 1939 and we offer great checking, deposit, lending, insurance and investment products. And because we're a credit union, we're owned by our members, not by shareholders. So we can offer lower rates on loans and higher rates on deposits. It's easy to become a Charter Oak member: simply live, work, worship, learn, or volunteer in New London or Windham counties. Join today and see why Members Bank Better at Charter Oak!