

CU WealthNext Announces Board Leadership Changes, Welcomes New Directors

Strategic Board Appointments Strengthen CU WealthNext's Commitment to Empowering Credit Unions with Next-Generation Wealth Solutions

BEVERLY HILLS, CA, UNITED STATES, February 25, 2025 /EINPresswire.com/ -- [CU WealthNext](#), the premier wealth solutions provider exclusively designed for credit unions, announces key leadership changes within its Board of Directors.

Ronald Boehnlein, a founding board member of CU WealthNext and a longtime leader in the credit union industry, has officially retired from both Zeal Credit Union and the CU WealthNext Board. Boehnlein's vision and leadership were instrumental in shaping CU WealthNext, helping establish it as a trusted partner for credit unions seeking cutting-edge wealth management solutions.

"We are very grateful for Ron's service on the CU WealthNext Board. He saw the vision early and played a crucial role in our success. We wish him a fulfilling and well-earned retirement," said Joshua J. Herman, CEO of CU WealthNext. "At the same time, we are thrilled to welcome Julie Kreinbring and Dana Tell to the Board. Their leadership and strategic insights in the credit union industry will be invaluable as we continue to innovate and expand our solutions."

Julie Kreinbring, CEO of Zeal Credit Union, and Dana Tell, CEO of Team One Credit Union, bring extensive experience in financial strategy and credit union leadership. Their commitment to member-first financial solutions aligns seamlessly with CU WealthNext's mission to empower credit unions with the tools they need to compete in today's rapidly evolving financial landscape.



CU WealthNext is dedicated to helping credit unions retain and grow their member base by providing next-generation investment, retirement planning, and wealth management solutions. As a CUSO holding company, CU WealthNext ensures that financial excellence stays within the credit union community, allowing institutions to offer comprehensive, cost-effective wealth solutions without requiring members to seek outside alternatives.

Through strategic partnerships with top fintech innovators, CU WealthNext delivers an ecosystem tailored to the unique needs of credit unions and their members. With the addition of Kreinbring and Tell to its leadership team, CU WealthNext is further strengthening its commitment to modernizing wealth services while upholding the core values that credit unions represent.

For more information about CU WealthNext and its Board of Directors, visit cuwealthnext.com.

About CU WealthNext

CU WealthNext partners with leading fintech innovators to bring cutting-edge investment, retirement planning, and wealth management tools to credit unions and their members. By providing a modular, cost-effective, and values-driven approach, CU WealthNext enables credit unions to offer next-generation financial solutions while keeping wealth management services within their institutions.

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