



WHEN: Tuesday, March 10, 2026
TIME: 12:00 p.m. – 1:30 p.m.
WHERE: Billings Federal Credit Union (**New Location**)
2522 4th Ave North
Admin. Building (lower level conference room)
Billings, MT 59103

You may park in the Parking Garage or in front of the Admin. Building next to the drive through.

Register on the **yvcshrm.starchapter.com**

COST: \$25.00

“Your Values, Your Finances”:

Heidi Davey- Experience Manager, Altana Federal Credit Union

When employees feel financially secure and supported, they bring more focus, energy, and engagement to their work. This class provides a powerful foundation for long-term financial wellbeing, benefiting both employees and the organization.

While organizations can’t always provide raises, they can empower employees to take control of their income in ways that feel aligned with their values and support smarter financial choices. This workshop helps participants step back from the numbers to first explore what matters most to them and then connect those values to practical financial decisions.

Learning Objectives:

- **Align spending with what they value most.**
- **Improve communication around money with partners and family.**
- **Make informed financial choices that build confidence and reduce stress.**

By focusing on values-driven financial wellbeing, employees gain clarity and confidence in managing their money-leading to less financial stress, stronger engagement, and healthier workplace culture.



Heidi Davey is the Experience Manager at Altana Federal Credit Union in Billings, MT, where she has dedicated more than 20 years to advancing financial wellbeing and fostering connection. In her role, Heidi leads community, membership, and employee engagement efforts—whether she’s teaching financial literacy “K through gray,” planning events that bring people together, or guiding employee development and onboarding.

Heidi is both SHRM-certified and a Credit Union Development Educator (CUDE), bringing expertise in people strategy and financial empowerment. Known as Altana’s unofficial “cheerleader,” she has a passion for celebrating growth, development, and success at every level. Heidi’s energy and experience make her a trusted guide for helping employees align their values with their financial choices—building confidence, reducing stress, and supporting long-term wellbeing.

Please [RSVP online](#) by 5:00 p.m. on Monday, **March 9, 2026**.

If you have any questions, please contact YVC SHRM VP of Programs, Raul Espindola raul.espindola@stockmanbank.com