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July 28-31, 2020

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[www.CULeaders.com](http://www.CULeaders.com)

## AGENDA

(Please note that the schedule is subject to change. To confirm the program schedule, please visit [www.culeaders.com](http://www.culeaders.com))

### Tuesday, July 28 – Pre-Conference Workshops

**1:00 PM EDT**

**Pre-Conference Hot Topic Workshop**

**Hot Topic #1:** Think Big, Act Small – How to Succeed as an Innovative and Entrepreneurial CU

Jeff Rendel

**Pre-Conference Hot Topic Workshop**

**Hot Topic #2:** Do it Like a Pro – How to Decipher Your CU's Financial Statements in 2-1/2 Minutes

Tim Harrington

**Pre-Conference Hot Topic Workshop**

**Hot Topic #3:** Hands-On Workshop: 9 Steps to Create Deferred Compensation Program to Help Recruit & Retain Executive Talent

Andy Roquet

## Wednesday, July 29 – Conference Day 1

**10:00 AM EDT**

**Virtual Exhibit Hall Opens**

Trade Show

**11:00 AM EDT**

**Keynote Session**

**Lone Survivor, Marcus Luttrell: A Tribute to Courage, Honor and Leadership**

Marcus Luttrell

**11:45 AM EDT**

**General Session**

**Credit Union Outlook in a COVID-19 World**

TBA

**12:15 PM EDT**

**General Session**

**5 x 5 - Five speakers share their innovative solutions in five minutes or less**

TBA

**12:45 PM EDT**

**Virtual Exhibit Hall & Mid-Day Stretch**

**1:30 PM EDT**

**Breakout Sessions**

<b>Leadership</b>	<b>Financial Management</b>	<b>Marketing</b>	<b>Member Business Lending</b>	<b>Cybersecurity</b>
4 Alternative Funding Vehicles That Can Improve Income During These Challenging Economic Times	Bill Hampel's Economic Outlook for 2021 & Beyond	Digital Marketing Multiplied – 6 Simple Steps to Maximize Your Digital Growth Potential	Making the Transition from MBL to MBS: A 5 Step Strategy to Greater Profitability	The Rise of the Planet of the Apps: The Battle for Members in a Mobile-Centric World Continues
Andy Roquet	Bill Hampel	James Robert Lay	Jim Devine	Dave DeFazio

**2:00 PM EDT**

**Breakout Sessions**

<b>Leadership</b>	<b>Cybersecurity</b>	<b>Member Business Lending</b>	<b>Financial Management</b>	<b>Marketing</b>	<b>Lending</b>	<b>Human Resources</b>
Digital Banking: Innovative Ideas to Convert to Your CU's Operations for the "New Normal"	Emerging Cyber Risks: Practical Strategies to Guard Against Real-Time Threats	Helping Main Street Move Forward with Efficient Small Loan Programs	Judgment Day: How to Win the Ultimate Financial Battle for Core Deposits, Better Technology & Economy of Scale	Marketing While in a Majority-Minority Shift: A 4 Step Cultural Segmentation Model	Solved Mysteries of Your Loan Portfolio: 5 Key Strategies to Unlock Your Data Insights	The Boomer's Guide to Managing & Working With Millennials
Tim Harrington	Derek Laczniak, Carlos Molina	Michael Mucilli	Peter Duffy	Victor Miguel Corro	Derrick Wiemer	Flynt Gallagher, John Moreno

**2:30 PM EDT**

**Breakout Sessions**

<b>Marketing</b>	<b>Financial Management</b>	<b>Lending</b>	<b>Leadership</b>
From Marketing to Branding: How to Build a Brand that Creates Value for You & Your Members	It's Just Lunch: Finding the Perfect Merger	Lending Strategies in a Pandemic World: How to Adapt and Pivot in Uncertain Times	Women & Leadership: How To Set Yourself Up for Success
Amanda Thomas	Glenn Christensen	Brian Waldron, Patrick Zarifian	Val Mindak

**3:00 PM EDT**

**Opening Day Reception & Virtual Exhibit Hall**

## Thursday, July 30 – Conference Day 2

**10:00 AM EDT**

**Private**

**Breakfast of Champions - Idea Sharing** *(Available to the first 300 paid attendees)*

Dennis Sullivan

**Virtual Exhibit Hall Opens**

**11:00 AM EDT**

**Keynote Session**

**Atomic Habits: How to Get 1% Better Every Day to Make a Big Impact**

James Clear

**11:45 AM EDT**

**General Session**

TBA

**12:15 PM EDT**

**Breakout Sessions**

<b>Cybersecurity</b>	<b>Human Resources</b>	<b>Financial Management</b>	<b>Marketing</b>	<b>Lending</b>	<b>Financial Management</b>	<b>Leadership</b>
Cyber-Fraud and Cyber-Security: Bridging the Gap to Protect Your CU & Your Members	Exposing & Eliminating the Elephant in Your CU	Opportunities, Tips, Tricks, Secrets and Pitfalls of Loan Participations	Re-Imagining Space: Designing Your Branches and Home Office for a Digital Age	Rev up your Auto Loan Profitability	Subordinated Debt: A Tool For Growth — is it Right for Your Credit Union?	Top 10 Emerging Trends Every CU Leader Must Know in a COVID-19 Economy
Alex Hernandez	Dr. Samuel Jones	Ryan McCarroll, William D. Paton	Jim Caliendo	Matt Roe	TBA	Elliot Eisenberg

**12:45 PM EDT**

**Virtual Exhibit Hall & Mid-Day Stretch**

**1:30 PM EDT****Breakout Sessions**

<b>Financial Management</b>	<b>Leadership</b>	<b>Marketing</b>
Interactive Financial Forum - Share & Learn Best Practices  TBA	Interactive Leadership Forum - Share & Learn Best Practices  Andy Roquet	Interactive Marketing Forum - Share & Learn Best Practices  James Robert Lay

**2:00 PM EDT****Breakout Sessions**

<b>Human Resources</b>	<b>Leadership</b>	<b>Cybersecurity</b>	<b>Marketing</b>	<b>Member Business Lending</b>
CU Case Study: Keys to Create a Culture of Engaged Employees (Part 1)  Lisa Sutton	Merger Mania: Practical Guidance for Every CU Leader in the New M&A Market  Lawrence Spaccasi	Penetrating Testing: Top 5 Hot Spots Every CU Must Know to Ensure Compliance  Andrew Hay	Purpose Driven Innovation & Driving Brand Love  Jeff Fromm	Risk Tolerance: How to Target Your MBL So You Get the Deals that are Best for Your CU  Ancin Cooley

**2:30 PM EDT****Breakout Sessions**

<b>Leadership</b>	<b>Lending</b>	<b>Human Resources</b>	<b>Marketing</b>	<b>Member Business Lending</b>	<b>Lending</b>
"Okay Boomer!" "Okay Zoomer!" "How to Bridge the Great Generational Divide  Renee Sattiewhite	20 Tactics that can DOUBLE Your Direct Auto Loan Volume  Brett Christensen	Focus on Your Strengths – Not Your Weaknesses: Keys to Create a Culture of Engaged Employees (Part 2)  Stosh D. Walsh	From PFI to Engagement: Best Practices Marketers Can Use to Get Members to Choose Your CU First  Andrew Downin	MBL Panel: Winning Tactics from America's Leading Commercial Lenders  Sam Burns, Brendan Wiechert	Re-imagine Mortgage Lending: One Thing Any CU Can Do to Compete with the Big Banks -- and Win!  Brandy Phillips

**3:00 PM EDT****Virtual Exhibit Hall & Reception**

## Friday, July 31 – Conference Day 3

**10:00 AM EDT**

**Virtual Exhibit Hall Finale**

Trade Show

**11:00 AM EDT**

**Keynote Session**

**How to Run a Values-Led Business & Make Money, Too**

Jerry Greenfield

**11:45 AM EDT**

**Breakout Sessions**

<b>Cybersecurity</b>	<b>Human Resources</b>	<b>Lending</b>	<b>Marketing</b>
Interactive Cybersecurity Forum - Share & Learn Best Practices	Interactive HR Forum - Share & Learn Best Practices	Interactive Lending Forum - Share & Learn Best Practices	Marketing In A Post Virus Economy
TBA	TBA	TBA	Mark Arnold

**12:15 PM EDT**

**General Session**

**The Big Four: Strategies for Growth Beyond 2020 with the Convention's All-Time Favorite, Patrick Adams**

Patrick Adams

**12:45 PM EDT**

**Conference Concludes**