



LONE SURVIVOR  
**Marcus Luttrell**  
A TRIBUTE TO COURAGE,  
HONOR & LEADERSHIP



FORMER PIXAR ANIMATOR  
**Matthew Luhn**  
STORYTELLING FOR  
BUSINESS



STAND-UP ECONOMIST  
**Elliot Eisenberg,**  
ECONOMIC TRENDS Ph.D.



BEN & JERRY'S  
**Jerry Greenfield**  
GROW A VALUES-LED  
BUSINESS



2020

# CU LEADERSHIP SUMMIT

PARIS LAS VEGAS JULY 28-31, 2020

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**Elliot Eisenberg, Ph.D.**  
ECON70,  
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**Tim Harrington, CPA**  
PRESIDENT,  
TEAM RESOURCES



**Andy Roquet**  
SR. EXECUTIVE BENEFITS,  
CUNA MUTUAL GROUP



**Renee Sattiewhite**  
CEO & FOUNDER, SATTIEWHITE TRAINING  
PRODUCTIONS, INC.



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# 2020 CU LEADERSHIP SUMMIT

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Get practical solutions and innovative ideas from the country's leading leadership experts.

It's the only event of its kind where you get the benefits of a small-group summit and the experience of a big-time convention.

Here are just a few highlights...



## 4 Alternative Funding Vehicles That Improve Investment Options

*Andy Roquet, Sr. Executive Benefits Specialist, CUNA Mutual Group*

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**CUNA MUTUAL GROUP**  
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## 9 Best Practices to Grow (Without a Merger) in an Ultra-Competitive Market

*Tim Harrington, CPA, President, TEAM Resources*



## It's Just Lunch: Finding the Perfect Merger

*Glenn Christensen, President, CEO Advisory Group*



## Women & Leadership: How To Set Yourself Up for Success

*Val Mindak, CEO, Park City CU & 2019 CU Leadership Convention's Award Winner*



## Top 10 Economic Trends Every CU Leader Must Know – Guaranteed to Entertain & Educate!

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## Merger Mania: Practical Guidance for Every CU Leader in the New M&A Market

*Lawrence Spaccasi, J.D., Partner at Luse Gorman, P.C.; Peter Duffy, Managing Director, Piper Sandler Companies; Glenn Christensen, Founder and President/CEO, CEO Advisory Group*



## "Okay Boomer!" "Okay Zoomer!" Bridge the Great Generational Divide

*Renee Sattiewhite, CEO & Founder, Sattiewhite Training Productions, Inc.*

Dear CU Leader,

You are invited to the **2020 CU Leadership Summit** – a special benefit that is included with an **ALL-ACCESS PASS** to the **43<sup>rd</sup> CU Leadership Convention, July 28-31, at Paris Las Vegas!**

The **CU Leadership Convention** is like nothing else in the credit union movement.

You get practical guidance from some of the nation's leading marketing experts in the **2020 CU Leadership Summit** that you would come to expect from a small, highly interactive group that is ready to share their best ideas.

Plus, you get the experience of a big-time convention with thought-provoking and inspirational keynote presentations ... networking opportunities with the country's most innovative leaders ... world-class entertainment with comedian Louie Anderson ... and the excitement of gaining practical solutions from across 7 different breakouts you can use to grow and better serve your members!

**All in one place over 4 days in America's most thrilling city – Las Vegas!**

What's new for 2020:

- **4 All-New Pre-Conference Workshops** designed to solve your toughest challenges!
- **7 NEW!** Roundtable forums for sharing ideas.
- **Special Half-Day Workshop with Matthew Luhn**, master storyteller, author of *The Best Story Wins* & former Pixar animator.
- Expanded Networking opportunities.
- Re-designed Exhibit Hall showcasing the newest & most innovative solutions.

One registration entitles you to an **ALL-ACCESS PASS** to all the keynote presentations, **50 breakout sessions** featured across **7 different summits**, complete access to the exhibit hall, roundtable discussions – and the opening night's show featuring Louie Anderson!

Find out for yourself why this is the #1 Event for so many credit union leaders!

See you in Vegas.

Dennis J. Sullivan  
Convention Chairman





# What's New for 2020!



**Marcus Luttrell**  
NAVY SEAL, LONE SURVIVOR



**Matthew Luhn**  
FORMER PIXAR ANIMATOR



**Jerry Greenfield**  
CO-FOUNDER OF BEN & JERRY'S



**Patrick Adams**  
ST. LOUIS COMMUNITY CU



## All Access Pass

Featuring **7 NEW Breakout Summits** with more than **50 thought-provoking sessions from 60 expert speakers!** ONE ticket gives you an ALL-ACCESS pass to ALL Breakout Summits. Pick and choose from dozens of terrific sessions.

- > Financial Summit
- > Marketing Summit
- > Human Resources Summit
- > Leadership Summit
- > Lending Summit
- > Cybersecurity Summit
- > Member Business Lending Summit

See an  
incredible  
line-up of  
KEYNOTE  
SPEAKERS!

ONE TICKET =  
ALL SESSIONS

## STORYTELLING FOR BUSINESS WORKSHOP WITH HOLLYWOOD ANIMATOR **Matthew Luhn**

Join former Pixar animator and master storyteller, Matthew Luhn, in a special small-group workshop as he teaches you how to harness the power of a good story to connect and engage with your market. Author of *The Best Story Wins*, Matthew gives you the same powerful techniques he has shared with companies like Salesforce, Google (four times at Google in 2019!), Udemy, Gartner, Charles Schwab, Target, Lego, Sony, Facebook, Adidas, Expedia, Hilton, LinkedIn, Bath & Body Works, Microsoft and Apple. Separate registration required.  
**Limited to the first 200 registrants.**

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SAVE UP TO **\$250 PER PERSON**  
WHEN YOU SEND **7+ ATTENDEES**

Register by  
3/25/20.



**CULeaders.com**



**Marcus Luttrell**  
NAVY SEAL, *LONE SURVIVOR*

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

Marcus Luttrell is the author of the #1 New York Times best-selling book, *Lone Survivor*, which tells the harrowing story of four Navy SEALs who journeyed into the mountainous border of Afghanistan and Pakistan in Operation Redwing. An unparalleled motivational story of survival, the book is also a moving tribute to the friends and teammates from SEAL Team Ten who did not make it off the mountain. Luttrell's amazing story made the leap to the big screen with the blockbuster film, *Lone Survivor*, directed by Peter Berg and starring Mark Wahlberg as Luttrell. Join Marcus Luttrell in a very powerful and thought-provoking keynote address as he discusses how anyone can achieve incredible success with determination, perseverance and a drive to "never quit."



**Matthew Luhn**  
FORMER PIXAR ANIMATOR

## Storytelling for Business – Lessons CU Leaders Can Learn from a Top Hollywood Animator

Storytelling is the #1 business skill necessary to connect, motivate, and lead people in today's world. Stories compel us to engage in experiences, learn lessons, and define our values and ourselves within our organization. Matthew Luhn, a 20-year Pixar story veteran, brings his experience creating and developing 10 blockbuster films at Pixar (including *Finding Nemo*, *Ratatouille*, *Up*, *Toy Storys 1-3*, *Monsters, Inc.*, *Monsters University*, and *Cars*), and provides practical strategies that teach and inspire people and teams to connect more effectively with audiences on an emotional level. Matthew uses the power of storytelling to bridge the gap between business and heart, driving your story toward one unforgettable selling point.

## CEO Q&A Luncheon with "The BowTie Economist" Elliot Eisenberg, Ph.D.

[LIMITED TO FIRST 150 CEOS WHO REGISTER. NO ADDITIONAL FEE REQUIRED.]

Join Dr. Eisenberg over lunch and bring your toughest questions about the markets and the economy for him to chew on. As chief economist for GraphsandLaughs, LLC, and an internationally acclaimed economist, Dr. Eisenberg specializes in making the arcana and minutia of economics fun, relevant and educational. His research and opinions have been featured in *Bloomberg*, *Business Week*, *Bureau of National Affairs*, *Forbes*, *Fortune*, and many other publications. He's prepared to share his insights with you in this special luncheon.

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**SPECIAL CEO Q&A  
LUNCHEON**



## SPECIAL HALF-DAY WORKSHOP

# Storytelling for Business Workshop with Hollywood Animator Matthew Luhn

SEPARATE REGISTRATION REQUIRED. LIMITED TO THE FIRST 200 REGISTRANTS.

Join former Pixar animator and master storyteller, Matthew Luhn, in a special small-group workshop as he teaches you how to harness the power of a good story to connect and engage with your market. Participants learn how to:

- Communicate a unique story in one sentence
- Master the three key elements of storytelling
- Create well structured stories with the Story Spine
- Successfully brainstorm with others, using the “Yes and...” principle
- Harness the “Universal Truths” that connect with all people
- Transfer written ideas into visual beat boards
- Embrace fear and failing as a necessary part of the creative process
- Develop techniques to overcome blocks

Author of *The Best Story Wins*, Matthew gives you the same powerful techniques he has shared with companies like Salesforce, Google (four times at Google in 2019!), Udemy, Gartner, Charles Schwab, Target, Lego, Sony, Facebook, Adidas, Expedia, Hilton, LinkedIn, Bath & Body Works, Microsoft and Apple.



**Jerry Greenfield**  
CO-FOUNDER OF BEN & JERRY'S

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

Jerry Greenfield and his long-time friend and business partner, Ben Cohen, are the men behind one of the most talked-about and least conventional success stories in American business. Co-founder of Ben & Jerry's Homemade, Inc., Jerry has helped to build a store front venture into an ice cream and business phenomenon by making social responsibility and creative management strengths, rather than weaknesses. Jerry reveals a nuts-and-bolts guide to the promise and pitfalls of “values-led” business and offers a wake-up call for “socially conscious” and “mission-driven” leaders today.



**Patrick Adams**  
ST. LOUIS COMMUNITY CU

## The Big Four: Strategies for Growth Beyond 2020

Financially, CUs are the healthiest they have been in many years. More than 95% have at least a CAMEL 2 rating. Most are flush with capital. Yet, a new generation is coming who can buy anything from A to Z with one-click, Google answers in an instant, and they can access an entire world from a pocket phone. “We may be the single, healthiest entity that may also no longer be relevant if we’re not careful,” warns Patrick Adams. Find out how to capitalize on the Big Four: Innovation, Member Experience, Corporate Culture & Social Responsibility – so your CU thrives for the next 10, 20, 30 years. The time is now!



## 4 Alternative Funding Vehicles That Improve Investment Options

**Andy Roquet, Sr. Executive Benefits Specialist,**  
CUNA Mutual Group

Don't settle for traditional CU investments any longer! Learn how your credit union can take advantage of investment instruments outside the limitations of Parts 703 and 704 to help offset expenses for executive and employee compensation and benefits—and your CU's charitable donations. Discover how to structure a funding program that is compliant and fits within your credit union's strategic goals.



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## 9 Best Practices to Grow (Without a Merger) in an Ultra-Competitive Market

**Tim Harrington, CPA, President, TEAM Resources**

Feeling the urge to merge? Stop! You do NOT need to merge to survive. Join Tim Harrington as he gives you 9 proven strategies other CUs are using to increase profits, reduce costs, boost membership and drive up ROA. You won't want to miss these CU-tested strategies to better compete in your market.



## It's Just Lunch: Finding the Perfect Merger

**Glenn Christensen, President, CEO Advisory Group**

Just like dating, finding a CU partner can be just as frustrating. Yet, there is much to consider in a CU partner including the affects a merger may have on member services ... employee turnover ... executive retention ... and the impact on the community. Take home Glenn Christensen's practical merger strategies using his **4-Stage Structured Process** to help you find the perfect partner.



## Women & Leadership: How To Set Yourself Up for Success

**Val Mindak, CEO, Park City CU & 2019 CU Leadership Convention's Award Winner**

You work hard, you're smart and you're driven. Discover how to get a seat at the table, take charge of your career & get noticed. Join Val Mindak as she reveals how to create a personal action plan ... set goals ... make the commitment needed ... and maintain a work/life balance to bring your plan to life! **BONUS:** Every attendee also gets Val's **10 Rules to Climb the Ladder of Success.**



## Top 10 Economic Trends Every CU Leader Must Know – Guaranteed to Entertain & Educate!

**Elliot Eisenberg, Ph.D., Econ70, GraphsandLaughs.com**

Elliot Eisenberg, Ph.D. (aka, "The Bowtie Economist") promises to entertain and educate in this fun, thought-provoking presentation as he reveals the latest economic trends and what they mean to you and your CU. Dr. Eisenberg shares everything you need to know to interpret the data and gain a better understanding of your local market conditions and what may lay ahead and why.



## Merger Mania: Practical Guidance for Every CU Leader in the New M&A Market

**Lawrence Spaccasi, J.D., Partner at Luse Gorman, P.C.;**  
**Peter Duffy, Managing Director, Piper Sandler Companies;**  
**Glenn Christensen, Founder and President/CEO, CEO Advisory Group**

Three of the most innovative M&A experts share the stage to help you uncover ... resolve key non-economic issues early in the process ... Leverage the key factors you need to grow and maintain adequate ROA and capital ... confidently assess a potential merger partner ... and overcome the most important CU deal killers.



## "Okay Boomer!" "Okay Zoomer!" Bridge the Great Generational Divide

**Renee Sattiewhite, CEO & Founder, Sattiewhite Training Productions, Inc.**

The biggest generation since the Baby Boomers are entering the workforce with very different expectations & different work styles. Long-time CU trainer Renee Sattiewhite shows how CU leaders can embrace the 4 Quadrants needed for better communication AND understanding between Millennials and Boomers.



New!

## SPECIAL HALF-DAY WORKSHOP

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Matthew Luhn  
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## Digital Marketing Multiplied – 6 Simple Steps to Maximize Your Digital Growth Potential

**James Robert Lay**, Founder & CEO, Digital Growth Institute

Digital can help CUs increase loans and gain more deposits than ever before. Take home strategies for every stage of a consumer's digital buying journey that have increased digital leads by as much as 1,500% in addition to generating over \$120,000 new member lifetime value from digital referrals in just 3 months.



## Marketing in a Majority-Minority Shift

**Victor Miguel Corro**, CEO, Coopera

Question: Is it better to position your CU as multicultural or focus instead on one segment at a time? Victor Miguel Corro unlocks the mystery as he walks through 5 Essential Insights to building a Cultural Segmentation Model that helped other CUs increase Hispanic membership by 10.7%, boost lending by 4.3% and better serve your market.



## Re-Imagining Space: Designing Your Branches and Home Office for a Digital Age

**Jim Caliendo**, President & COO, PWCampbell

Find out how CUs are re-imagining their branches to support member engagement strategies to provide education, advising, counseling and re-designing their home offices to attract and retain employees. See for yourself how newly designed credit unions are integrating tech and supporting face-to-face interactions to appeal to members in their 60s as well as their 20s in an era of clicks and bricks.



## Purpose Driven Innovation & Driving Brand Love®

**Jeff Fromm**, Partner, Barkely, co-author of *The Purpose Advantage*

Purpose and innovation are the two key strategies used by brands to create meaningful differentiation that fuels both growth and profit. Find out how to create more loyal members ... boost employee retention ... encourage cultural conversations ... and how to leverage the Purpose-Profit Loop™ to increase your bottom line.



## From PFI to Engagement: Best Practices Marketers Can Use to Get Members to Choose Your CU First

**Andrew Downin**, CPA, Chief Marketing & Strategy Officer, Vantage West CU

At a time when members have instant access to competitors, is it still possible to be a Primary Financial Institution (PFI)? How are CUs overcoming the PFI challenge, and getting members to choose their products? Andrew Downin unveils the **5 Steps to Improve Member Engagement** with real-life examples you can apply immediately at your CU.



## From Marketing to Branding: How to Build a Brand that Creates Value for You & Your Members

**Amanda Thomas**, Founder & President, Two Score

Amanda Thomas unveils the strategy she used with one CU by building a Brand Articulation Strategy that has increased lending 199.97%, turned around membership attrition by a decrease of 21.61%, and reduced loan run-off by 7.69% from 2017 - 2019.



## Bill Hampel's Economic Outlook for 2021 & Beyond

**Bill Hampel**, Economist

One of the credit union movement's most respected economists, Bill Hampel, returns to share his expert analysis of the economy for the next 18 months. Get answers to critical questions. Find out first-hand how your CU's loan demand, savings flows and earnings may be affected – and how the economy may affect member behavior.



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## Judgment Day: How to Win the Ultimate Financial Battle for Core Deposits, Better Technology & Economy of Scale

**Peter Duffy**, Managing Director, Piper, Sandler Companies

As a CU Leader, you're the lynchpin that works to ensure every financial obligation meets or exceeds member expectations externally while also balancing the risk of those investments internally. Pete Duffy reveals the interconnected risks in the battle for core deposits, investments in new technology and the constant pursuit of efficiency – and how you can drive growth while also increasing profitability. Plus, take home 4 strategies to create better value for your members based on the practices of the Top Performing CUs.



## Opportunities, Tips, Tricks, Secrets and Pitfalls of Loan Participations

**William D. Paton**, Assistant Vice President, Lending & Participation; **Ryan McCarroll**, Strategic Initiatives Leader, Alloya Corporate FCU

Loan Participations are critical to effectively manage your balance sheet. Take home industry best practices to most effectively utilize participations as well as solutions to some of the toughest challenges facing other CUs. Finally, we'll provide case studies to highlight the financial value (increasing ROA by 22% in one study) and reveal other loan participation tactics that have boosted bottom lines.

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## Subordinated Debt: A Tool For Growth – is it Right for Your Credit Union?

**Larry Spaccasi, Esq.**, Luse Gorman, PC

Newly proposed NCUA regulations clarify the regulatory treatment of subordinated debt and specify how CUs can take advantage of such instruments to expand their capital base, lending power and overall ability to serve more members. Learn the risks and benefits of subordinated debt so you can determine if it should be part of your CU's capital management toolbox.



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# 2020 CU LENDING SUMMIT

## Loan Pricing: How Loan Structures, Deposit Levels & Allowance Methods Impact Pricing

**David Koch**, Managing Director of Advisory Services, Abrigo  
CUs need high-quality and profitable loans while also responding to the rising market rates. A common struggle is pricing relationships where we reward borrowers for overall activities, including current and potential deposit relationships. Explore the concepts of deposit valuation within loan pricing and learn how credit loss factors should be included in overall pricing approaches.



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## Solved Mysteries of Your Loan Portfolio: 5 Key Strategies to Unlock Your Data Insights

**Derrick Wiemer**, CIO/CCO, VISIBLE EQUITY

Data is king. Do you rule data or does data rule you? Are you hand-cuffed in excel or siloed in different technology platforms? What data should you be analyzing? How do you utilize data to serve members, mitigate risk, and increase profitability?



## 7 Small Things that Can Dramatically Boost Your Loan Balances and Lending Profitability

**Brain Waldron**, SVP/CLO, Hudson Valley FCU

Discover the little things one CU has done to reduce expenses 10-25% ... drive down delinquency rates to 0.56%, on average ... and work towards automating as much as 60%-65% of the application process ... increase the net interest margin .10-.25% ... and more!



## Rev Up Your Auto Loan Profitability

**Matt Roe**, SVP, Open Lending, LLC

Consumers' credit scores are critical to making safe & profitable loans, but they are not the only consideration. Plenty can be done to mitigate the risk of making near- and nonprime loans, ensure a nice return and bring more consumers in the doors. Leveraging data can help your credit union solve the challenges your members are facing and create financial growth for both you and your borrowers!



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## 20 Tactics that can DOUBLE Your Auto Loan Volume

**Brett Christensen**, Owner, CU Lending Advice, LLC

The nation's top CU lending expert returns to reveal the 20 tactics you can use to turnaround your direct auto loan program. Don't settle for lower margins in the face of tough competition with dealers and the captives. Find out how ordinary CU lenders are generating extraordinary performance with 1.3 ROAs ... 100% increases in direct loan volume ... and increased profitability.



## Re-imagine Mortgage Lending: One Thing Any CU Can Do to Compete with the Big Banks - and Win!

**Brandy Phillips**, VP of Mortgage, TDECU

One thing TDECU found they can do better than the Big Banks is this - go fast! Learn how Brandy Phillips redesigned the half-century-old mortgage lending process by cutting the traditional 30-day closing period down to just 18 (the goal is 10 days!) ... build a referral network among local Realtors ... and boost its loan volume by 36%.



## Direct Auto Lending: 3 Proven Strategies to a Successful Direct Auto Lending Program (without cutting rates!)

**Patrick Zarifian**, SVP/CLO, California CU

While many CUs have aggressively expanded their indirect loan programs, California CU has taken a different approach. 91% of CCU's auto loan portfolio is made up of direct auto loans - and it doesn't sacrifice rates, credit quality or LTV. CCU has managed to grow its auto loan portfolio by an average of 8% YoY since emerging from the Great Recession.



# 2020 CU CYBERSECURITY SUMMIT

## The Rise of the Planet of the Apps: The Battle for Members in a Mobile-Centric World Continues

**Dave DeFazio**, Partner, StrategyCorps

See firsthand how the newest fintech apps are changing how an entire generation is banking in this power-packed, LIVE demo. Discover how millennials can build credit without ever securing a credit card...buy while on Facebook...bank online without even banking - and how you can compete.



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## Emerging Cyber Risks: Practical Strategies to Guard Against Real-Time Threats

**Derek Lacznia**, CIC, CRM, Partner, Director of Cyber Practice, M3 Insurance; **Carlos Molina**, Senior Risk Consultant, CUNA Mutual Group

When risk management is effective, typically nothing bad happens. But if you're blindsided by a problem, your credit union reputation takes the hit.

This session will introduce emerging risks and loss trends associated with issues related to technology; frauds & scams; operations & security; and other cyber threats.



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## Cyber-Fraud and Cyber-Security: Bridging the Gap to Protect Your CU & Your Members

**Alex Hernandez**, VP, Emerging Technology, DefenseStorm

While the hackers have been stealing the headlines over data breaches, fraud remains credit unions' largest threat. Yet, many CUs have not bridged the gap between fraud prevention and cybersecurity costing billions in internal and external threats. Find out how to apply the newest tactics to protect against online attacks ... push payment scams ... identity theft ... account takeovers ... and more.



## Penetrating Testing: Top 5 Hot Spots Every CU Must Know to Ensure Compliance

**Andrew Hay**, Cybersecurity Strategist, LARES

Cybersecurity is a top priority for NCUA in 2020. Take home the Top 5 Hot Spots all CTOs must know to ensure compliance including reporting requirements ... managing 3rd-party auditors ... defining the scope of testing ... and much more. **BONUS:** Every attendee also gets LARES' One-Page Cybersecurity Risk Assessment Checklist you can take home.





# 2020 CU HUMAN RESOURCES SUMMIT

## The Boomer's Guide to Managing & Working With Millennials

**John Moreno**, Senior Managing Director, Meyer-Chatfield;  
**Flynt Gallagher**, President, Compensation Advisors

Millennials entering the workforce have created a seismic cultural shock for many. Millennials see no need to be patient and wait for a promotion. They seek an integration of work and life. They expect constant feedback. Managers and Baby Boomers, however, must adapt. Get the secrets you need to recruit, retain & work with the largest generation entering the workforce.



## Exposing & Eliminating the Elephant in Your CU

**Samuel Jones, Ph.D.**, [www.DrSamuelJones.com](http://www.DrSamuelJones.com)

Bottom lines are negatively impacted whenever diversity and inclusion issues arise. And this 'elephant in the room' continues to expand the gap between the behaviors that unlock the potentials of a diverse workforce and leaders acting as if it's not an issue. This program is designed to help credit unions create a competitive edge by instituting a culture of inclusive leadership for greater profitability and value creation. In this high-energy, life-changing session you will get the 4 levers that drive inclusion and the 6 behaviors that support inclusion efforts in the workplace you can use right away.



## CU Case Study: Keys to Create a Culture of Engaged Employees (Part 1)

**Lisa Sutton**, Senior Vice President, Human Resources, PSCU

What if you were given the tools that would make your employees 22x more likely to be engaged and reduce your turnover by 50%? Lisa Sutton reveals the keys to increase engagement at PSCU and how they are beginning to use those same tools to create an Employee Value Proposition for recruiting. This is practical guidance you can use right away.



**Note:** In Part 2 immediately following this session, Stosh Walsh shows how all CUs can create a culture of engaged employees.

## Focus on Your Strengths - Not Your Weaknesses: Keys to Create a Culture of Engaged Employees (Part 2)

**Stosh D. Walsh**, Managing Principal-Constant Organizational Development

A recent Gallup analysis reveals that "people who use their strengths every day are 3x more likely to report having an excellent quality of life, 6x more likely to be engaged at work, 8% more productive and 15% less likely to quit their jobs." Former Gallup expert Stosh D. Walsh provides insights any CU can use to create a Strength-Based Approach to Development and manage around weaknesses.



**Note:** Be sure to attend Part 1 of this topic presented by Lisa Sutton.

# 2020 Member Business CU LENDING SUMMIT

## Maximizing Your Share of Wallet Through Small Business Loans

**Michael Mucilli**, SVP/Senior Business Services Officer, CU Business Group

A strong small loan program can help your members' businesses grow, in turn helping the economic health of your community. Small loans are also a great way to help your credit union move beyond transactional lending and into more profitable commercial relationships. Join Michael Mucilli, Senior Vice President of CU Business Group, for best practices in developing a small loan program that will grow relationships and maximize your credit union's business share of wallet.



## Risk Tolerance: How to Target Your MBL So You Get the Deals that are Best for Your CU

**Ancin Cooley**, Founder/Principal, Synergy Credit Union Consulting

Just about every CU involved in business lending wants to grow. But at what cost? Are you willing to accept "C" and "D" Paper or just "A" Paper? Find out how to effectively evaluate your CU's true risk tolerance for commercial loans – and grow profitably. Plus, find out how to price your loans to compete with the Big Banks, streamline your underwriting – and ensure you are in compliance! Get the same secrets that have helped other CUs grow loans by 10% and boost Net Interest Margins.



## Balancing the Risks & Rewards of Member Business Lending

Member Business Lending offers huge rewards for CUs today that have not been available previously. MBLs are now the second-fastest growing loan product Yet, NCUA warns, "Commercial lending is not appropriate for all credit unions." Rewards also come with risk. Find out how to experience double-digit loan growth and manage the risk safely and soundly in this seminar. Plus, find out how to make commercial lending everyone's business in the CU!

## MBL Panel: Winning Tactics from America's Leading Commercial Lenders

**Brendan Wiechert**, Director of Commercial & Business Services, STCU; **Sam Burns**, VP Business Services, Purdue FCU

Competition for commercial banking is more challenging than ever. Yet, only 7% of the nation's financial assets are held by CUs. Hear for yourself how some of the country's most innovative MBLs are increasing market share ... competing with deep-pocketed banks ... identifying and serving niche commercial markets ... expanding credit & deposit services ... gaining critical operational and financial support for their boards ... and seizing new opportunities.



## Making the Transition from MBL to MBS: A 5 Step Strategy to Greater Profitability

**Jim Devine**, Co-Founder, Hipereon Financial Training Experts

As banks continue to buy market share by slashing rates on commercial real estate, CUs must shift to offering business members a holistic suite of financial products that include cash management tools, deposit services and capital management solutions. Discover how to transition to a Member Business Service using a 5-Step Strategy that is generating 20%-40% increases in overall profitability for some CUs that you can put to work in your shop.





**Jeff Rendel**  
PRESIDENT, RISING ABOVE  
ENTERPRISES

## HOT TOPIC #1

### Think Big, Act Small - How to Succeed as an Innovative and Entrepreneurial CU

What makes a group of innovative organizations turn value into profit, focus on growth, and lead their respective markets? The secret can be found in an entrepreneurial mindset that leads to creative choices, bold actions and dramatic results – small everyday acts any CU can use that can make a very big impact.

Find out how you can begin to create an innovative and entrepreneurial culture using the same strategies that have helped other CUs:

- Generate repeat business from 82% of new members.
- Grow non-interest income by 50% without increasing service fees.
- Maintain ROA levels well about 1.50% and net worth ratios in the low-teens.
- Engage high-potential employees that also increases retention and improves communication across departments.
- Extend the reach and brand value of existing products to drive growth.
- Expand time-tested operations and business models in new markets.

If you're tired of settling for mediocrity and want to seize new opportunities – regardless of squeezed margins, daunting competition and regulatory cost pressure – then you won't want to miss this special workshop.

**BONUS:** Every attendee at this special workshop also gets Jeff Rendel's all-digital, micro-learning webinars so you can continue to apply these ideas throughout the year.



**Tim Harrington**  
CPA, PRESIDENT, TEAM  
RESOURCES

## HOT TOPIC #2

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

We all know someone who can just seem to mystically glance at a CU's financial statement and immediately understand what it all means – and even flag problem areas that may not even be disclosed in the official numbers.

The real value of interpreting the financials is to read between the lines and to quickly and confidently make decisions based on the analysis. Tim Harrington, one of the CU Convention's All-Time Highest-Rated Speakers, reveals step-by-step how to evaluate the most important ratios so you can make informed decisions, anticipate the financial future and maximize your ROA.

In this hands-on seminar, Tim gives you the secrets you need so you can pick through the numbers and analyze your CU's financial condition – or any other CU's financials – in less than 2-1/2 minutes! The secret is to focus on what's most important. This guidance alone will save you hours of frustration and dead-end discussions.

Whether you're new to interpreting CU financials or you're a long-term veteran who wants to learn how the pros do it – this is a must-attend workshop!

Pre-conference Deep-Dive Hot Topic Workshops require separate registration.  
Choose one of four workshops held Tuesday, July 28, 1:00 - 5:00 pm.



**Andy Roquet**  
SR. EXECUTIVE BENEFITS SPECIALIST,  
CUNA MUTUAL GROUP

### HOT TOPIC #3

## Hands-On Workshop: 9 Steps to Create a Deferred Compensation Program to Help Recruit and Retain Executive Talent

It's natural that deep-pocketed financial institutions will eventually target your top executives, as success will do that. Deferred compensation programs are one of the few powerful incentives your credit union can prudently offer to keep your best executive talent from jumping to competitors.

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Executive Benefits  
Retirement Solutions

Join this hands-on workshop to walk through the often-complex structure of a deferred compensation program that allows your executives to earn income, in excess of their regular salary, that is paid at a future date. These arrangements provide income paid in retirement and/or in increments prior to retirement to help in recruiting and retaining the top performers to lead your credit union in fulfilling its strategic plan.

This hands-on session will walk through a 9-step framework for developing and maintaining a deferred compensation program to take your executive compensation and benefits package to the next level. You'll take away a custom plan outline that will help in implementing a program to reward the leaders your credit union needs to grow and thrive!

### HOT TOPIC #4



**James Robert Lay**  
FOUNDER & CEO,  
DIGITAL GROWTH INSTITUTE

## Planning for Exponential Growth: How to Develop a Digital Marketing Blueprint

Websites. Marketing automation. Email. Social media. Data and analytics. AI. The list of digital marketing tactics can feel overwhelming and frustrating as changes in technology, consumers, and the competition continues all around us. But it doesn't have to.

Attend this hands-on workshop to learn how to elevate your marketing, sales, and leadership teams with a Digital GROWTH Blueprint that has empowered other financial brands to transform their website into their number source for growth while adding an additional \$2.2 million in NII from converted digital leads in less than 18 months.

You'll leave this session with a 90-day strategic roadmap framed around your top Goals for Growth while also gaining clarity into the biggest Roadblocks you must eliminate along with the greatest Opportunities available for you to create or capture.



### Don't Miss These Two Bonus Offers:

1. Get a Complimentary Copy of Banking on Digital Growth: A Strategic Marketing Manifesto to Save Financial Brands
2. Three 30-minute strategic peer group coaching sessions lead by James Robert Lay that hold you accountable while providing you with further actionable insights.



# Venue Information

Paris, in the Heart of the Las Vegas Strip

Paris Las Vegas presents spectacular rooms, service, and entertainment. Come discover the world-renowned luxury that awaits you.

**ROOM RATE:** \$129 – \$139/night + \$20 daily resort fee

**HOTEL CUT-OFF DATE:** Sunday, July 5, 2020

**RESERVATION CENTER:** 877-603-4389 / Group Code: SPDIRO

## SPECIAL RATES:

We've reserved a limited number of rooms at Paris Las Vegas for special discounted rates. Attendees may make a reservation by calling 877-603-4389. Please mention the Group Code "SPDIRO" in order to get the discounted rate.

Attendees may also make their reservation online at <https://book.passkey.com/go/SPDIRO>

## HOTEL DEPOSIT & CANCELLATION POLICY:

Hotel allows individual cancellations without penalty up to seventy-two (72) hours prior to the guests' scheduled arrival date. Hotel shall charge the guest (1) night's guaranteed guest room rate plus tax for cancellation within seventy-two (72) hours of the scheduled arrival date or failure of the individual to check-in on the scheduled arrival date. Any remaining nights of a "no-show" reservation will be canceled. It is policy to require a credit card or cash deposit for incidental charges. **Hotel accepts Visa, MasterCard, American Express, Discover, or Diners Club.**

Check-in time is 4:00 PM and check-out time is 11:00 AM. Any departures after 11:00 AM are subject to the full day charge.

Paris Las Vegas requires a first night's room deposit and applicable tax charges, to guarantee accommodations.

## Book your room and save big!

Check out the deals from our friends at Paris Las Vegas:

- Complimentary in-room and meeting room Internet access (for 2 devices)
- Complimentary daily admission for 2 to the Fitness Center
- Join our Caesars Rewards® loyalty program to gain access to exclusive member pricing and earn credits when you play, dine, shop or stay.
- FREE Express Check-out



Questions?  
Need Assistance?

For help with registration, call 866-620-5937.

Our customer service team is available

M–F, 9:00am–5:00pm EST

Relax & Enjoy One of  
the Greatest Stand-Up  
Comedians of All Time

Louie  
Anderson

Get ready for a hilarious evening with iconic comedian Louie Anderson, a three-time Emmy Award® winner and one of the country's most recognized and adored entertainers. He was named by Comedy Central as "One of 100 Greatest Stand-Up Comedians of All Time." His career has spanned more than 30 years beginning with his debut on the Tonight Show with Johnny Carson in 1984. The rest is history. Leno, Letterman, The Late Late Show with Craig Ferguson, The Late Show with Stephen Colbert, "Comic Relief," Showtime, HBO and CMT specials followed, including hosting the legendary game show, Family Feud. He continues to tour the country performing to standing-room-only crowds worldwide with his inimitable brand of humor and warmth.

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Executive Benefits  
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## Guest Experience Packages

CHOOSE 1 OF 2 OPTIONS  
THURSDAY AFTERNOON, JULY 30

### PACKAGES INCLUDE

- One admittance to either the **Backstage Legends in Concert Tour** OR **Liberace Museum Collection** (Lunch is included).
- One admittance to one of Greatest Stand-Up Comedians, Louie Anderson.
- All conference breakfasts (not including Breakfast of Champions).
- Access to ALL refreshment breaks, plated luncheons & dessert socials.

# 1 LIBERACE MUSEUM COLLECTION

# 2 BACKSTAGE LEGENDS IN CONCERT

Get a private backstage tour of **LEGENDS IN CONCERT** – the long-running show in Vegas! See how stars such as Elvis, Frank Sinatra, Bono, Cher & Prince are transformed before they hit the stage. Meet the performers & take home pictures with your favorite legend!



Tour the **THRILLER VILLA**, the 28,000 sq. ft. mansion and infamous home of celebrities and legendary works of art featured at the Met Gala and Paris Museum of Modern Art. Experience the subterranean vaults, hidden courtyard and gardens while enjoying its mysterious charm.





# Sponsors & Exhibitors

The ALL-NEW 43rd CU Leadership Convention will be BIGGER, BETTER & BOLDER than ever with more innovative & thought-provoking speakers ... more world-class entertainment ... and more practical guidance uniquely designed to solve your toughest challenges & inspire you to achieve more.

## 5 BENEFITS OF GETTING IN FRONT OF OUR DECISION-MAKER ATTENDEES:

#1

SHOWCASE YOUR COMPANY'S SOLUTIONS TO SOLVE CREDIT UNION CHALLENGES

#2

GENERATE HIGHLY-QUALIFIED DECISION-MAKER LEADS THROUGH UNIQUE BRANDING OPPORTUNITIES

#3

BOOST YOUR FIRM'S PRESENCE AT THE INDUSTRY'S MOST TOP-RATED, WELL-ATTENDED CONVENTION

#4

ENSURE YOUR SOLUTION BECOMES A VALUABLE ASSET IN CREDIT UNIONS NATIONWIDE

#5

CLOSE THE DEAL BY NETWORKING WITH KEY DECISION-MAKERS & CHAIRMAN OF THE BOARD

1 OUT OF 12

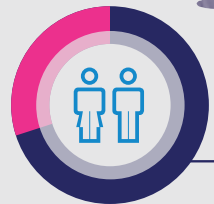
CREDIT UNIONS IN ATTENDANCE

MEET AN ENGAGED AUDIENCE OF CREDIT UNION EXECUTIVES



1,400+

CU EXECS, DIRECTORS & KEY DECISION-MAKERS



67%

C-SUITE EXECS/VPS



60+

SPEAKERS

SHARING BEST-PRACTICES AND PRACTICAL SOLUTIONS

### SIGNATURE PARTNER



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OR EMAIL [ATROUT@CULEADERS.COM](mailto:ATROUT@CULEADERS.COM).



# TO SAVE UP TO **\$250** A PERSON — REGISTER BY March 25, 2020



**LEADERSHIP**  
CONVENTION  
PARIS LAS VEGAS • JULY 28-31, 2020

**DISCOVER.  
EXPERIENCE.  
GROW.**



## ✓ YES! Sign us up for the 43rd CU Leadership Convention

We understand that the registration fee includes admittance to all sessions, continental breakfasts, luncheons, refreshment breaks, and working materials and any entertainment hosted by the convention. We also understand that the guest experience package includes admittance to 7 Breakout Summits, 2 continental breakfasts, 2 luncheons, 1 buffet breakfast, 1 guest experience tour, refreshment breaks and any entertainment hosted by the convention. Guest registration is necessary to attend one or all of these events and must be received prior to the event to ensure space.

CONFERENCE REGISTRATION	PRE-CONFERENCE DEEP-DIVE HOT TOPIC WORKSHOPS	STORYTELLING FOR BUSINESS WORKSHOP	GUEST REGISTRATION
<del>\$1,295</del> \$1,145*	\$395	\$295	<del>\$495</del> \$395*

\* Expires March 25, 2020. After this date, registration may be listed at the regular price.

## ✓ YES! Our CEO wants to join us.

Full conference registration July 28–31, 2020.

CEO CONFERENCE REGISTRATION	PRE-CONFERENCE DEEP-DIVE HOT TOPIC WORKSHOPS	STORYTELLING FOR BUSINESS WORKSHOP	GUEST REGISTRATION
<del>\$645</del> \$545*	\$395	\$295	<del>\$495</del> \$395*

## SPECIAL GROUP PRICING!

**SAVE UP TO \$250 PER ATTENDEE WITH OUR GROUP DISCOUNTS.**

Contact our Customer Service Team at 866-620-5937 for more information.

### 1–3 ATTENDEES:

Attendee Rate is \$1,145

**SAVE \$150 EACH!**

### 4-6 ATTENDEES:

Attendee Rate is \$1,095

**SAVE \$200 EACH!**

### 7+ ATTENDEES:

Attendee Rate is \$1,045

**SAVE \$250 EACH!**

## 3 Ways to Register

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

CALL 866-620-5937

[registrar@CULeaders.com](mailto:registrar@CULeaders.com)



We're so confident that the CU Leadership Convention will meet your credit union needs that we are offering our 100% Money-Back Guarantee. If you don't return to your credit union with the strategies needed to contribute to the growth of your organization, write us and we will promptly return your entire registration fee—no questions asked.

### Cancellations and Substitutions:

If you're unable to attend, you're welcome to send a substitute. Or, if you cancel in writing by Thursday, May 2, 2020, you may get a full refund. After that date, there is no refund, but you may use your registration fee at next year's CU Leadership Convention. Registrants who do not cancel and do not attend are liable for the full conference fee. Cancellations via phone will not be accepted.

**Questions?** Call 866-620-5937. Our customer service team is available M-F, 9 am–5 pm EST.

# 2020 CU LEADERSHIP SUMMIT

GO TO [WWW.CULEADERS.COM/LEADERSHIP](http://WWW.CULEADERS.COM/LEADERSHIP)

OR CALL 866-620-5937

PARIS LAS VEGAS  
JULY 28–31, 2020

TO SAVE UP TO \$250 A PERSON REGISTER BY MARCH 25, 2020 [USE CODE CX2020]

Take home practical guidance & innovative solutions including:

- 9 proven strategies to increase profits, reduce costs, boost membership & drive up ROA.
- Top 10 economic trends that will impact member behavior.
- Practical guidance for every CU leader in the new M&A market.
- 4 Quadrants needed to bridge the divide between Boomers & Zoomers.
- CU-tested strategies to better compete.
- A 4-stage structured process to finding the ideal merger partner.
- Alternative investments to fund executive compensation plans.
- And much more.

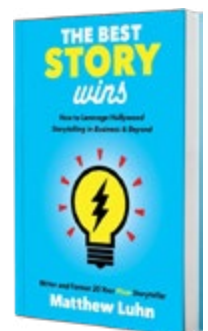
You may also be interested in this Special Half-Day Workshop...

## Storytelling for Business Workshop with Hollywood Animator Matthew Luhn | Thursday, July 30

SEPARATE REGISTRATION REQUIRED. LIMITED TO FIRST 200 REGISTRANTS.

Learn how to harness the power of effective communication to influence and engage others.

Matthew Luhn gives you the same powerful techniques he has shared with companies like Salesforce, Google, Udemy, Gartner Research, Charles Schwab, Target, Lego, Sony, Facebook, Adidas, Expedia, Hilton, LinkedIn, Bath & Body Works, Microsoft and Apple.



GO TO [CULEADERS.COM](http://CULEADERS.COM) FOR A LIST  
OF ALL THE SUMMIT SPEAKERS.