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LEADERSHIP CONVENTION

PARIS LAS VEGAS • JULY 28-31, 2020

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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
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Plus, **SAVE** even more with our sliding-scale discount. The more you send, the more you **SAVE**!

Every year, we strive to make the CU Leadership Convention **BIGGER, BOLDER** and more **INSPIRING**. Our 43rd year is no exception.

- Choose from **60+ information-packed sessions** across 7 BREAKOUT SUMMITS
Pick and choose your favorites.
- Reserve your seat for a special half-day workshop with former PIXAR ANIMATOR MATTHEW LUHN as he gives you the secrets to help you craft a better story for your CU!
- Choose from any of our **ALL-NEW Deep-Dive Hot-Topic Pre-Conference Workshops!**
Register for 1 of 4 options on critical topics including: How to create an entrepreneurial CU ... Interpret a CU's financials in 2 1/2 minutes ... Build an executive compensation plan ... Develop a digital marketing blueprint.
- Every morning we kick off the convention with the world's most inspiring and thought-provoking keynote speakers.
- And you won't want to miss **world-class comedian Louie Anderson** to cap off opening day with an evening that will have everyone laughing!

See you in Vegas!

Dennis J. Sullivan,
Convention Chairman

AGENDA-AT-A-GLANCE

TUESDAY, JULY 28, 2020

10:00 am – 05:00 pm..... Convention Registration Opens
01:00 pm – 05:00 pm..... Pre-Conference Workshops

WEDNESDAY, JULY 29, 2020

07:00 am – 08:45 am..... Exhibit Hall Opens & Continental Breakfast
09:00 am – 10:00 am..... Opening Keynote: Lone Survivor, Marcus Luttrell
10:00 am – 10:30 am..... General Session
11:00 am – 11:10 am..... Leadership Awards
11:10 am – 12:00 pm..... 6 Speakers Sharing their Best Ideas in 6 Just Minutes
12:00 pm – 01:15 pm..... Networking Luncheon/Exhibit Hall
01:15 pm – 04:00 pm..... Breakout Summits Sessions Begin
04:00 pm – 05:00 pm..... Happy Hour in the Exhibit Hall
08:00 pm – 09:30 pm..... Opening Night Entertainment: Louie Anderson

THURSDAY, JULY 30, 2020

07:30 am – 08:45 am..... Continental Breakfast/Breakfast of Champions
09:00 am – 09:45 am..... Keynote: Matthew Luhn–Storytelling for Business
09:45 am – 10:00 am..... 6 Speakers Share their Best Ideas in Just 2 Minutes
10:15 am – 11:00 am..... Breakout Summits Sessions Resume
11:45 am – 12:30 pm..... Roundtable Discussions & CU Connect Event
12:30 pm – 01:00 pm..... CEO Q&A Luncheon with Elliot Eisenberg, Ph.D.
12:30 pm – 01:15 pm..... Networking Luncheon/Exhibit Hall
01:45 pm – 03:45 pm..... Special Half Day Workshop: Matthew Luhn
01:45 pm – 03:45 pm..... Breakout Summits Sessions Resume

FRIDAY, JULY 31, 2020

07:30 am – 09:00 am..... Buffet Breakfast
09:00 am – 10:00 am..... Keynote Speaker: Jerry Greenfield, Staying True to Your Mission
10:00 am – 11:00 am..... Closing Speaker: Patrick Adams, Strategies for Growth

Who should attend?

- CEOs
- Board Chairs/Directors
- Supervisory Committee Members
- Chief/VP of Marketing
- Chief/VP of Finance
- Chief/VP of Lending
- Chief/VP of Technology
- Chief/VP of HR
- Chief/VP of Member Business Lending

Whats New for 2020!

SAVE UP TO
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WHEN YOU
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MARCH 25



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 session from 60 expert speakers!** ONE ticket gives you an ALL-ACCESS pass to ALL Breakout Summits. Pick and choose from dozens of terrific sessions.

See an
incredible
line-up of
KEYNOTE
SPEAKERS!

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

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.**

HALF-DAY
WORKSHOP



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

Register by
3/25/20.



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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. And he's prepared to share his insights with you in this special luncheon.



**SPECIAL CEO Q&A
LUNCHEON**



SPECIAL HALF-DAY WORKSHOP

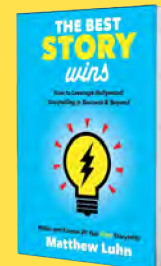
Storytelling for Business Workshop with Hollywood Animator Matthew Luhn

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 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!

Breakout Summits

Featuring 60+ SPEAKERS & 50+ SESSIONS.

New sessions added every week. Go to www.CULeaders.com for live updates

LEADERSHIP SUMMIT

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

Speaker: 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 the story behind the statistics on such hot topics as trade tariffs, GDP, ROA, household wealth, auto lending, home loans, inflation, interest rates and the all-important yield curve. Find out 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. Be ready to take plenty of notes you can use. There’s no sugar coating here!



CEO BONUS: The first 150 CEOs who register for the convention are invited to a private luncheon and Q&A with Elliot Eisenberg, Ph.D. Bring your toughest questions about the economy, the markets, or the financial industry – and get the answers you need.

HUMAN RESOURCES SUMMIT

Exposing & Eliminating the Elephant in Your CU

Speaker: Samuel Jones, Ph.D., 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.



LENDING SUMMIT

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

Speaker: Brandy Phillips, VP of Mortgage, TDECU

Competing with the likes of Bank of America, JP Morgan Chase or Wells Fargo in mortgage lending is a challenge for any CU. But there is one thing TDECU found they can do better than the Big Banks – *go fast!* Learn how Brandy Phillips redesigned the half-century-old mortgage lending process to differentiate itself 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%. Don’t make a move without hearing Brandy’s secret that helped them turn everything around!



TECHNOLOGY & CYBERSECURITY SUMMIT

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

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

As the largest insurance provider of business protection solutions focused on credit unions, CUNA Mutual Group has provided over 2,300 risk consultations with credit union leaders. Our consultants dive deep into 40 years of credit union claims data to provide valuable insights to strengthen your risk mitigation program. When risk management is effective, typically nothing bad happens. But if you’re blindsided by a problem, your credit union reputation takes the hit. Don’t let not knowing what’s around the corner take the blame. This session will introduce emerging risks and loss trends associated with issues related to technology; frauds & scams; operations & security; and other cyber threats. Introducing ways credit unions can confidently safeguard their organization from these risks will also be highlighted.



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Executive Benefits
Retirement Solutions

LEADERSHIP SUMMIT

“Okay Boomer!” “Okay Zoomer!” Bridge the Great Generational Divide

Speaker: *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 ... different attitudes ... and different career goals. 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.



FINANCIAL SUMMIT

Bill Hampel's Economic Outlook for 2021 & Beyond

Speaker: *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 including: How likely is a recession to occur? How might employment be affected? Is GDP expected to continue to expand? Are interest rates expected to rise or fall? What about inflation? 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.



MEMBER BUSINESS LENDING SUMMIT

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 Bank, 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.



TECHNOLOGY & CYBERSECURITY SUMMIT

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

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

While the hackers have been stealing the headlines over data breaches, fraud remains credit unions' largest threat. It's just more sophisticated. Yet, many CUs have not bridged the gap between fraud prevention and cyber-security 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.



LENDING SUMMIT

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

Speaker: *David Koch, Managing Director of Advisory Services, Abrigo*

Lending teams should look at originating both high-quality and profitable loans. Is your CU responding to the rising market rates in today's economic condition? 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.



TECHNOLOGY & CYBERSECURITY SUMMIT

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

Speaker: *Dave DeFazio, Partner, StrategyCorps*

Dave DeFazio of StrategyCorps, one of the CU Leadership's Convention's #1 rated speakers, is back! This time he reveals how the newest fintech apps are changing how an entire generation is banking. See for yourself in a 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 more. Most importantly, discover how you can compete now before the financial world changes as you know it.



LEADERSHIP SUMMIT

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

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

Feeling the urge to merge? Stop! You do NOT need to merge to survive or thrive – even in today's instant access, always-on, demanding market. Join Tim Harrington, one of the CU Leadership's Top-Rated speakers, as he gives you 9 proven strategies to grow your CU with real-world case studies you can use in your CU. These are the same tactics 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.



LENDING SUMMIT

20 Tactics That Can DOUBLE Your Direct Auto Loan Volume

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

The nation's top CU lending experts – and one of the CU Leadership Convention's most dynamic speakers – 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.



LENDING SUMMIT

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

Speaker: *Brian Waldron, SVP/CLO, Hudson Valley FCU*

Disruption! Revolutionary Thinking! Big Hairy Audacious Goals! These buzzwords may help sell the latest business books, but they don't always lead to steady, sustainable growth. Brian Waldron isn't looking for the "next big thing" at Hudson Valley FCU. He's focused on building relationships with members – small things that make a big difference in lending.



Discover the little things he has done over time 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!

MARKETING SUMMIT

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

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

Digital empowers financial marketers and their sales teams to sell more loans and gain more deposits than ever before. But many CUs are held back by legacy thinking and systems built around branch sales and broadcast marketing even though 81% of consumers start their financial buying journey online. Break free from the past and learn how to confidently map out digital consumer journeys for your key product lines with a simple, 6-step strategic framework. 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.



MEMBER BUSINESS LENDING SUMMIT

Maximizing Your Share of Wallet Through Small Business Loans

Speaker: *Michael Mucilli, SVP/Senior Business Services Officer*

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.



HUMAN RESOURCES SUMMIT

CU Case Study: Keys to Create a Culture of Engaged Employees

Speaker: *Lisa Sutton, Sr. Vice President, Human Resources, PSCU*

What if you were given the tools that would make your employees 22x more likely to be engaged? What if you could reduce turnover for any reason by 50%? What if you could use your employees' strengths as levers to create a culture of engaged employees? Get the answers to these difficult challenges as SVP of Human Resources, 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.



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LENDING SUMMIT

Rev Up Your Auto Loan Profitability with Data Driven Decisions

Speaker: 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 in more consumers. Even pricing for the associated risk of making a nonprime auto loan, CUs still can make consumer-friendly loans that generate a return appropriate to the risk. In a market with high delinquency and a need to serve those of modest means, 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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LEADERSHIP SUMMIT

4 Alternative Funding Vehicles That Improve Investment Options

Speaker: Andy Roquet, Sr. Executive Benefits Specialist, CUNA Mutual Group

Don't settle for traditional CU investments! Learn how to invest outside the limitations of Parts 703 and 704 to help offset expenses for executive compensation—and your CU's charitable donations. Discover how to invest in funding options such as Business-Owned Life Insurance (BOLI), annuities, trading stocks and bonds and FASB-compliant equities—with the possibility of increased returns but additional risk. Find out how to structure a funding program that is compliant and fits within your strategic goals.



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Executive Benefits Retirement Solutions

FINANCIAL SUMMIT

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

Speaker: Peter Duffy, Managing Director, Sandler O'Neill, L.P.

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. One of the CU Leadership Convention's Top Speakers, 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.

LENDING SUMMIT

Direct Auto Lending: 3 Proven Strategies to a Successful Direct Auto Lending Program (Without Cutting Rates!)

Speaker: Patrick Zarifian, SVP/CLO, California CU

While many CUs have aggressively expanded their indirect loan programs in the face of increasing competition and aggressive dealer incentives, 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. Find out how CCU competes with a diligent marketing approach, a new risk-based pricing process that has reduced some loan approvals to just minutes and a cross-selling program that has helped increase auto loan production volume by over 10%. See for yourself how you can grow your direct auto lending portfolio without competing on the loan rate.



LEADERSHIP SUMMIT

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, Sandler O'Neill & Partners, L.P.; Glenn Christensen, Founder and President/CEO of CEO Advisory Group

Every day, on average, there is another merger in the credit union movement. Nearly all are driven by the desire to better compete in the market and improve member services in an era of unprecedented technological change. However, every merger is different and is fraught with pitfalls. To help you make the best decisions in a merger for your CU and your members, we have brought together three of the most innovative M&A experts to help uncover potential liabilities ... 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.





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!



James Robert Lay
FOUNDER & CEO,
DIGITAL GROWTH INSTITUTE

HOT TOPIC #4

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 lead 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 guestroom 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.

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

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Our customer service team is available

M-F, 9 am - 5 pm EST

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Louie
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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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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!



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#1

SHOWCASE YOUR COMPANY'S SOLUTIONS TO SOLVE CREDIT UNION CHALLENGES

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#3

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#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

MEET AN ENGAGED AUDIENCE OF CREDIT UNION EXECUTIVES



CREDIT UNIONS IN ATTENDANCE

1,400+

CU EXECS, DIRECTORS & KEY DECISION-MAKERS



67%

C-SUITE EXECS/VPS



60+ SPEAKERS

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EXPERIENCE.
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✓ 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 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
\$1,295 \$1,145*	\$395	\$295	\$495 \$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
\$645 \$545*	\$395	\$295	\$495 \$395*

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4-6 ATTENDEES:

Attendee Rate is \$1,095

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7+ ATTENDEES:

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SAVE \$250 EACH!

3 Ways to Register

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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.

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- > Book 20%-40% more auto loans.
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Discover how to:

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- > 6 time-tested growth strategies from America's Top MBLs.
- > Best practices to conduct loan reviews – fast!
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