





Marcus Luttrell

A TRIBUTE TO COURAGE, HONOR & LEADERSHIP BEST-SELLING AUTHOR

James **Clear** 

FOSTERING PRODUCTIVITY
IN TURBULENT TIMES



Renee Sattiewhite

COMMITMENT TO CHANGE: CUS UNITE AGAINST RACISM BEN & JERRY'S

Jerry Greenfield

GROW A VALUES-LED BUSINESS



CEO, PARK CITY CU

Val **Mindak** 

2019 CULC LEADER OF THE YEAR WOMEN & LEADERSHIP

NCUA BOARD CHAIRMAN

Rodney E. Hood

2020 OUTLOOK FROM THE CREDIT UNION MOVEMENT'S CHIEF REGULATOR





Some credit unions stay away from investment options the National Credit Union Administration permits.

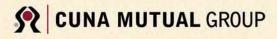
Why? The rules are complex. The potential for greater returns doesn't seem worth the risk.

With CUNA Mutual Group's team of experienced specialists (an average of 30 years in the business), you have a resource for helping to navigate the industry's unique and changing regulatory landscape—and for avoiding difficult and time-consuming NCUA examinations.

CUNA Mutual Group has collaborated with CUES® on a new online resource, to help interpret key sections of the NCUA Examiner's Guide relating to employee and executive benefits funding programs.

DOWNLOAD THE COMPLIMENTARY EBOOK NOW at <a href="https://www.cunamutual.com/exam-guide-ebook">www.cunamutual.com/exam-guide-ebook</a> and learn how to create a more robust, adaptable benefits funding program.

For more information on funding employee and executive benefits, call the CUNA Mutual Group Executive Benefits Service Center at 800.356.2644, ext. 665.8576.



### Welcome to the CU Leadership Virtual Convention!

As we seem to be making history for all the wrong reasons lately, I'm excited to announce that you are part of the credit union industry's first week-long virtual convention!

If there was ever a time to come together to share best practices, innovative ideas, and solutions that would benefit others, it is now!

Every year, we strive to make the CU Leadership Convention bigger, bolder and more inspiring. And this year is no exception despite the many challenges facing our communities.

- » Enjoy timely practical guidance, inspiration and solutions from the safety and comfort of your home or office.
- » Choose from dozens of information-packed sessions across 7 Breakout Summits. Pick and choose your favorites.
- » Choose from our ALL-NEW Deep Dive Hot-Topic Pre-Conference Workshops. Register for either "Financial Management in a Pandemic Economy" or "Think Big, Act Small - How to Succeed as an Innovative and Entrepreneurial CU."
- » Kick off each day with some of the world's most inspiring and thought-provoking keynote speakers.
- » Discover how vendors are adapting to bring credit unions innovative solutions needed most right now.

See inside for all the details. This helpful guide will also help you get access to all the speaker sessions, meet with colleagues, participate in idea-sharing sessions, talk with solution providers in our virtual exhibit hall, and much more.

We hope you find your experience to be valuable while also remaining safe and healthy!

Dennis J. Sullivan

Dav. Silv

Convention Chairman

### **Table of Contents**

| User Guide                     | 6          |
|--------------------------------|------------|
| Experiencing More              | 7          |
| Keynote Speakers               | 11         |
| Agenda-at-a-Glance1            | .4         |
| Pre-Conference Workshops1      | .8         |
| CU Leadership Summit Sessions2 | 20         |
| <u>Leadership</u> 2            | 20         |
| Marketing2                     | 22         |
| Financial2                     | 4          |
| Human Resources2               | 26         |
| Technology & Cybersecurity2    | 28         |
| Lending3                       | 80         |
| Member Business Lending3       | 32         |
| Sponsors                       | 35         |
| Exhibitor Partners3            | 37         |
| Save the Date4                 | <b>ļ</b> 2 |



### The CU Movement's 1st Week-Long Virtual Convention comes to Life! Right Here. Right Now!



### LOAN PARTICIPATIONS (SIMPLIFIED):

# Keep liquid. Keep lending.



Participate online this fall!

More information coming soon.

Our job is to make your job easier.



Tell me more

### **USER GUIDE**

As an attendee of the CU Leadership Virtual Convention, you can enjoy these 4 benefits...



### On-Demand Access for 12 Months

View from anywhere. Anytime. No additional cost!



### Virtual Exhibit Hall

Meet with solution providers in our "virtual tradeshow." Always open!



### **Interactive Breakout Sessions**

Network & learn how other CUs are adapting in a pandemic economy



### **One-click Networking**

Discuss hot topics in real-time chat, discussion forums and on video.

6

### Accessing the virtual convention is as easy as 1-2-3

- 1. Go to your "Welcome" email and click the button granting you access to the virtual platform.
- 2. Create a password. Go to My Account >> Edit My Profile.
- 3. View presentations, set up meetings, create your personal schedule and participate in the events at https://culeaders.pathable.co

### **▶** Want more guidance?

Check out our "How-to" videos

Understanding the Virtual Platform | How to Edit your Profile | How to Set-up Meetings

### **EXPERIENCE EVEN MORE!**



### Cast your vote for the CU Leadership Convention's Innovation of the Year Award

Thursday, July 30, 3:15 pm EDT

See the newest and most promising products and services in the market as the country's top providers compete for the 2020 Best in Show Innovation of the Year Award. Each solution provider has only 3 minutes to make their pitch in this fast-moving and engaging forum. Don't miss it!

### Win an All-ACCESS registration for the 2021 CU Leadership Convention!

Enter the drawing to win a FREE registration (valued at \$1,295) to the 44th CU Leadership Convention, July 27-30, 2021 at The Mirage, Las Vegas!

Every time you interact with an Exhibitor you earn points.

Earn at least 30 points and you're entered for the drawing!

**10 points** = Join a virtual trade show live meeting.

**10 points** = Request info from exhibitor.

**5 points** = Watch exhibitor/sponsor videos.

**5 points** = Download exhibitor/sponsor files

July 27- 30th, 2021 - Mirage, Las Vegas GROW.



Hurry! Winner will be announced Friday, July 31st at 12:15 pm EDT.

### Get up & get moving with some of the leading Stretch and exercise instructors from wherever you are!



### Join Coach Vigue for a low-impact & invigorating Stretch Routine for Men & Women

Wednesday, July 29, 1:00-2:20pm EDT "YouTube's most watched Yoga and Pilates guy!"

**Sean (Coach Vigue)** is one of the most followed yoga, power yoga and Pilates core instructors in the world, a multiple bestselling author, husband to Jillian and father to Dane and Addie.

He is also an amateur historian of opera/classical music, civil war, 70's NFL football and film.

Train with him on YouTube: @SeanVigueFitness

### Relax and unwind with a full-body stretch!

Thursday, July 30, 1:00 – 1:20 pm EDT

Get up from your PC & get your body moving with Group Fitness Instructor **Danielle Kerker**.

This 15 minute break will get your blood going and feature light stretching and basic exercise. All are welcome!

Danielle Kerker has been a Group Fitness Instructor for more than 20 years and a certified Personal Trainer for more than 10 years. She holds certifications from AFAA and ACE which are both nationally accredited organizations. In 2016, she began competing in NPC bodybuilding and placed 3rd in the Women's Figure category of 35 and over and in 2019 she placed 1st in the Women's Figure category 50 and over.



### OpenLending

### Say YES to more automotive loans

The **Lenders Protection** program is a unique auto lending enablement platform that allows financial institutions and other auto lenders to model their specific overhead and funding costs and set a target ROA for their insured portfolio. The result is a profitable auto loan portfolio with carefully managed pricing and risk characteristics. Visit www.openlending.com to learn more.

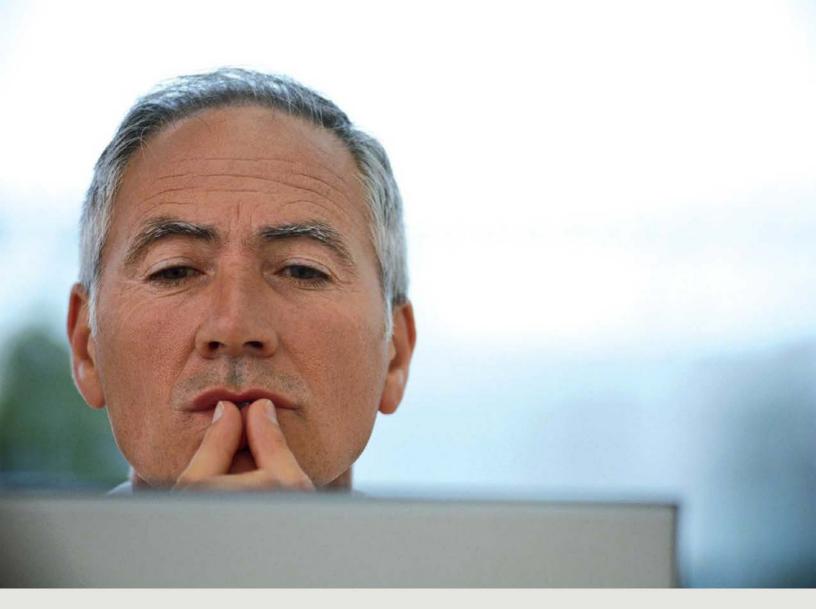


Join Matt Roe, Open Lending's Chief Revenue Officer, for the breakout session Rev up your Auto Loan Profitability

11:15 AM - 11:45 AM (CDT) on July 30, 2020

Click here to visit our virtual booth!





# Do you have the resources to maintain a strong cyber defense?

Learn More



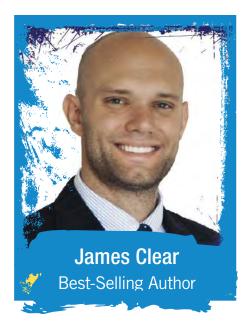
CUNA Mutual Group is the marketing name for CUNA Mutual Holding Company, a mutual insurance holding company, its subsidiaries and affiliates. Insurance products offered to financial institutions and their affiliates are underwritten by CUMIS Insurance Society, Inc. or CUMIS Specialty Insurance Company, members of the CUNA Mutual Group. Some coverages may not be available in all states. If a coverage is not available from one of our member companies, CUNA Mutual Insurance Agency, Inc., our insurance producer affiliate, may assist us in placing coverage with other insurance carriers in order to serve our customers' needs. CUMIS Specialty Insurance Company, our excess and surplus lines carrier, underwrites coverages that are not available in the admitted market. Cyber policies are underwritten by Beazley Insurance Group or other nonaffiliates admitted carriers. CSS-3146345.1-0620-0722. © CUNA Mutual Group 2020 All Rights Reserved.

### **KEYNOTE SPEAKERS**



### 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."



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

How can you see dramatic improvement in your personal and professional life?

The natural impulse is to attempt big steps to improve. However, taking big steps often results in failure or only temporary gains. You rarely see the permanent results you want. The key to successful change is in small habits.

In this entertaining talk, James Clear focuses on the science of small habits, how they work, and how their effects compound and multiply over time. Through research and personal stories, audiences will not only be entertained but also come away with practical strategies they can immediately apply in their personal and professional lives.

11

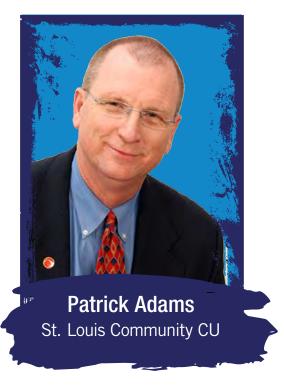
### **KEYNOTE SPEAKERS**



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.



### 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!

12

# LUSE GORMAN attorneys

We have specialized in representing and counseling community financial institutions, including credit unions, for over 25 years. We are consistently ranked as one of the leading law firms nationally in mergers and acquisitions. We also advise our clients on a wide range of matters, including:

- Credit union mergers and bank acquisitions
- Charter conversion/expansion
- executive compensation/employee benefits
- corporate governance
- regulatory, compliance and enforcement matters.

For more information, please visit our website or contact:

Lawrence M.F. Spaccasi
(202) 274-2037
<a href="mailto:lspaccasi@luselaw.com">lspaccasi@luselaw.com</a>

Kent M. Krudys (202) 274-2019 kkrudys@luselaw.com Thomas P. Hutton (202) 274-2027 thutton@luselaw.com

Jeffrey M. Cardone (202) 274-2033 jcardone@luselaw.com

### AGENDA AT A GLANCE

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

1:00 PM 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

### Wednesday, July 29 - Conference Day 1

10:00 AM Virtual Exhibit Hall Opens | Trade Show

11:00 AM Keynote Session | Lone Survivor, Marcus Luttrell: A Tribute to Courage, Honor and Leadership - Marcus Luttrell

11:45 AM General Session | 2020 Outlook from the Credit Union Movement's Chief Regulator - NCUA Chairman Rodney Hood

12:15 PM General Session | 4 x 5 - Four speakers share their innovative solutions in five minutes or less

12:45 PM Virtual Exhibit Hall & Mid-Day Stretch with Coach Vigue!

1:30 PM Breakout Sessions

### Leadership

4 Alternative Funding Vehicles That Can Improve Income During These Challenging Economic Times - Andy Roquet

### Financial Management

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

#### Human Resources

Commitment to Change: Credit Unions Unite Against Racism - Renee Sattiewhite

### Marketing

Digital Marketing Multiplied – 6 Simple Steps to Maximize Your Digital Growth Potential - James Robert Lay

#### Member Business Lending

Making the Transition from MBL to MBS: A 5 Step Strategy to Greater Profitability - Jim Devine

### Cybersecurity

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

### Lending

Will Indirect Auto Finance Save Your Portfolio: 5 Ways to Build a Successful Indirect Program - Jon Patton & Don Bader

https://culeaders.pathable.co

2:00 PM Breakout Sessions

### Leadership

Digital Banking: Innovative Ideas to Convert to Your CU's Operations for the "New Normal" - Tim Harrington

#### Cybersecurity

Emerging Cyber Risks: Practical Strategies to Guard Against Real-Time Threats -Derek Laczniak & Carlos Molina

### Member Business Lending

Helping Main Street Move Forward with Efficient Small Loan Programs - Michael Mucilli

#### Financial Management

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

2:30 PM Breakout Sessions

### Member Business Lending

4 Steps to Leverage PPP and Find Growth Opportunities - Jim Pond

### Leadership

Women & Leadership: How To Set Yourself Up for Success - Val Mindak

### Financial Management

It's Just Lunch: Finding the Perfect Merger - Glenn Christensen

#### Marketing

Marketing While in a Majority-Minority Shift: A 4 Step Cultural Segmentation Model - Victor Miguel Corro

#### Lending

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

#### Human Resources

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

John Moreno & Flynt Gallagher

#### Marketing

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

### Lending

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

#### Human Resources

Resiliency: 5 Tools for Leaders to Manage Stress & Anxiety in Chaotic Times -Josh Allison

3:00 PM Opening Day Reception with Magician & Mentalist Harrison Kramer & Virtual Exhibit Hall

### Thursday, July 30 - Conference Day 2

10:00 AM Breakfast of Champions - Idea Sharing - Dennis Sullivan

(Share what's working & learn from others in this special session)

Virtual Exhibit Hall Opens

11:00 AM Keynote | Atomic Habits: How to Get 1% Better Every Day to Make a Big Impact - James Clear

11:45 AM General Session | Marketing in a Post Virus Economy - Mark Arnold

#### 12:15 PM Breakout Sessions

### Leadership

Top 10 Emerging Trends Every CU Leader Must Know in a COVID-19 Economy" - Elliot Eisenberg

### Cybersecurity

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

### Financial Management

Opportunities, Tips, Tricks, Secrets and Pitfalls of Loan Participations - William D. Paton & Ryan McCarroll

#### 12:45 PM Virtual Exhibit Hall & Mid-Day Stretch

with Trainer Danielle Kerker

#### 1:30 PM Breakout Sessions

#### Leadership

Interactive Leadership Forum - Share & Learn Best Practices - Andy Roquet

#### Financial Management

Interactive Financial Forum - Share & Learn Best Practices - Bill Paton

#### 2:00 PM Breakout Sessions

### Lending

20 Tactics that can DOUBLE Your Direct Auto Loan Volume - **Brett Christensen** 

#### Human Resources

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

### Leadership

Merger Mania: Practical Guidance for Every CU Leader in the New M&A Market - Lawrence Spaccasi, Peter Duffy & Glenn Christensen

### Cybersecurity

Penetrating Testing: Top 5 Hot Spots Every CU Must Know to Ensure Compliance - Andrew Hay

### Financial Management

Subordinated Debt: A Tool For Growth — is it Right for Your Credit Union? - Lawrence Spaccasi

### Marketing

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

### Lending

Rev up your Auto Loan Profitability - Matt Roe

#### Member Business Lending

Winning Tactics from America's Leading Commercial Lenders (Part 1) - Building a Winning Combination - Sam Burns

### Marketing

Interactive Marketing Forum - Share & Learn Best Practices - James Robert Lay

### Marketing

Purpose Driven Innovation & Driving Brand Love - **Jeff Fromm** 

### Member Business Lending

Risk Tolerance: How to Target Your MBL So You Get the Deals that are Best for Your CU -Ancin Cooley 2:30 PM Breakout Sessions

### Leadership

"Okay Boomer!" "Okay Zoomer! "How to Bridge the Great Generational Divide -Renee Sattiewhite

#### Human Resources

Getting Employee Engagement Right: How to IMPLEMENT, SUPPORT and MEASURE a Long-Term Employee Engagement Strategy - Stosh D. Walsh

#### Marketing

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

#### Member Business Lending

Winning Tactics from America's Leading Commercial Lenders (Part 2) - Building Commercial Relationships - Brendan Wiechert

### Lending

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

### Financial Management

Value Driven Retention, Retirement, and Yield - Eric Stearns

3:00 PM Virtual Exhibit Hall & Reception

### Friday, July 31- Conference Day 3

10:00 AM Trade show | Virtual Exhibit Hall Finale

11:00 AM Keynote | How to Run a Values-Led Business & Make Money, Too -

**Jerry Greenfield** 

11:45 AM Breakout Sessions

#### Human Resources

Interactive HR Forum - Share & Learn Best Practices - Lawrence Dvorchik

### Lending

Interactive Lending Forum - Share & Learn Best Practices - Ancin Cooley

### 12:15 PM General session I The Big Four: Strategies for Growth Beyond 2020 with the

Convention's All-Time Favorite - Patrick Adams

12:45 PM Conference concludes

### Cybersecurity

Interactive Cybersecurity Forum - Share & Learn Best Practices - Alex Hernandez



Mission Driven & Fiscally Aligned

### **Supplemental Executive Benefits**

With 28 years specializing in supplemental executive retention and retirement plans for credit unions, Stearns Financial has the expertise to design, implement, and administer every type of executive benefit program.

Leverage our expertise to drive yield, supplement retirement, and optimize retention and succession.







RETIREMENT



**YIELD** 



### PRE-CONFERENCE DEEP DIVE WORKSHOPS



**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.



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!



Is your wealth management program a core part of your business today?

There's tremendous growth opportunity for credit unions within their investment services programs. While fifty-two percent of members prefer accessing financial services at a credit union, member penetration is only three percent. By partnering with CUNA Brokerage Services Inc. (CBSI) to grow your program, you get a company with an unparalleled knowledge of credit unions and their members, plus game-changing innovation.

To learn more, visit cunamutual.com/CBSI or contact your CUNA Mutual Group sales executive at 800.356.2644.



### CUNA Brokerage Services, Inc.

<sup>1</sup>Making Wealth Management Core in Credit Unions, Kehrer Bielan, December 2018.

Securities sold, advisory services offered through CUNA Brokerage Services, Inc. (CBSI), member FINRA/SIPC, a registered broker/dealer and investment advisor. CBSI is under contract with the financial institution to make securities available to members. Not NCUA/NCUSIF/FDIC insured, May Lose Value, No Financial Institution Guarantee. Not a deposit of any financial institution. CBSI is a registered broker/dealer in all fifty states of the United States of America. The representative may also be a financial institution employee that accepts deposits on behalf of the financial institution.

### SUMMIT SESSION DESCRIPTIONS



### 4 Alternative Funding Vehicles That Improve Investment Options

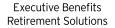
union's strategic goals.

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

Sponsored by:







### Digital Banking: Innovative Ideas to Convert to Your CU's Operations for the "New Normal"

Tim Harrington, CPA, President, TEAM Resources

Every one of us has been suddenly thrust into a digital future. Everything we want to purchase and everyone we want to "see" is now done digitally, like it or not! A digital first strategy is now absolutely necessary for every credit union of every size. If not, the Fintechs and Big Banks will! Fortunately, you don't have to figure it out alone. New products and technology have arrived on the scene in the last few months that make the digital leap much easier. In this session, I will identify a variety 3rd party partners that are creating amazing and affordable digital products and systems for even small credit unions. Discover how you can leverage new technology to better serve your members, create a new experience when they do come into your branches and how the role of tellers will forever change for the better!



### 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**."

https://culeaders.pathable.co Back to table of contents 🔨

### Top 10 Emerging Trends Every CU Leader Must Know in a COVID-19 Economy

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 the COVID-19 Recession, 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. Be ready to take plenty of notes you can use. There's no sugar coating here!

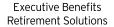
### Interactive Leadership Forum - Share & Learn Best Practices

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

Join your peers in this highly engaging discussion forum where you can share and learn solutions to your toughest leadership challenges amid the most chaotic time in nearly a century.

Sponsored by:







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

Lawrence Spaccasi, Partner, Luse Gorman, PC

Peter Duffy, Managing Director, PiperSandler

Glenn Christensen, President, 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 economic and 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.

10 Rules to Climb the Ladder of Success.

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

Renee Sattiewhite, CEO & President, African-American Credit Union Coalition

The biggest generation since the Baby Boomers are entering the workforce with very different expectations ... different work styles ... different attitudes ... and different career goals. Yet, Baby Boomers aren't willing to quickly give up their own expectations and attitudes either. 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 – and bridge the great divide between the two most influential generations. Take home practical strategies you can use right away.

https://culeaders.pathable.co Back to table of contents 🔨

### SUMMIT SESSION DESCRIPTIONS



### Digital Marketing Multiplied - 6 Simple Steps to Maximize Your Digital Growth Potential



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.

### Marketing While in a Majority-Minority Shift: A 4 Step Cultural Segmentation Model



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.

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



Amanda Thomas, Founder & President, TwoScore

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. These are ideas that will work in any economy!

https://culeaders.pathable.co Back to table of contents ^

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

Jim Caliendo, President & CEO, 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.

### Interactive Marketing Forum - Share & Learn Best Practices

James Robert Lay, Founder & CEO, Digital Growth Institute

Join your peers in this highly engaging discussion forum where you can share and learn solutions to your toughest marketing challenges amid the most chaotic time in nearly a century.



### Purpose Driven Innovation & Driving Brand Love

Jeff Fromm, Partner, Speaker, 4x Author, Barkley, 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<sup>TM</sup> 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.



### Marketing In A Post Virus Economy

Mark Arnold, Founder & CEO, On the Mark Strategies

The world changed overnight. So did marketing. If you want to increase your credit union's revenue today, then consumers have to know about you. The only way that happens is with a focused marketing message. You will learn how to grow membership, increase loans and boost assets all through more efficient marketing. You credit union can no longer afford to waste money on bad marketing. Discover how to asses and adapt your marketing to accelerate your growth.

https://culeaders.pathable.co Back to table of contents 🔨



### SUMMIT SESSION DESCRIPTIONS



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

Sponsored by:







Bill Hampel, Economist, MDB Hampel LLC

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 long will the recession continue? How will long will double-digit employment continue? What about inflation as the economy recovers? Find out first-hand how your CU's loan demand, savings flows and earnings may be affected over the coming months – and how member behavior is likely to change.

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



Peter Duffy, Managing Director, PiperSandler

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 amid the chaos. Plus, take home 4 new strategies to create better value for your members based on the practices of today's Top Performing CUs.

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





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.

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

Sponsored by:







William D. Paton, Assistance Vice President, Lending & Participation, Alloya Corporate FCU

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.

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

Sponsored by:





Lawrence Spaccasi, Partner, 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.

### Interactive Financial Forum - Share & Learn Best Practices

Join your peers in this highly engaging discussion forum where you can share and learn solutions to your toughest financial management challenges amid the most chaotic time in nearly a century.

### SUMMIT SESSION DESCRIPTIONS



### Commitment to Change: Credit Unions Unite Against Racism

Renee Sattiewhite, CEO & President, African-American Credit Union Coalition



Find out how CUs can leverage their cooperative power and local influence to lead during times of crisis and create more diversity and inclusion in communities across the nation. Join us in this historic time in a unique presentation that will consist of an empathetic, honest, and respectful discussion that is geared towards better understanding, not blame. Plus, find out what other credit unions are doing to create change for African Americans and other communities of color affected by racism and discrimination.

### 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.

### Resiliency: 5 Tools for Leaders to Manage Stress & Anxiety in Chaotic Times

Josh Allison, Founder, Think Café

As a new generation of college graduates pour ever-more into the workplace, the unique anxiety and overwhelm challenges they face have come along with them. As a result, the leaders of today and tomorrow will be faced with new coaching, development and engagement challenges as these workers struggle to navigate a quickly changing workplace. Join Josh Allison as he shares key essentials for pushing back against workplace anxiety and stress during these uncertain times. Using research reflected and scientifically supported strategies, Josh will share FIVE TOOLS designed to help you build emotional resiliency to push back against the worrisome unknown and daily overwhelm. All in 30 minutes.

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

Lisa Sutton, Econ70, GraphsandLaughs.com

What if you were given the tools that would make your employees 22x more likely to be engaged? What if you learned that the highest engaged companies have turnover that is 50% less than lower engaged companies? 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 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.

### Getting Employee Engagement Right: How to IMPLEMENT, SUPPORT and MEASURE a Long-Term Employee Engagement Strategy



Stosh D. Walsh, Managing Principal, Constant Organizational Development

You want to create a great culture at your CU where people are engaged, turnover is rare, productivity is high, people have a chance to build on their strengths, and members receive excellent service. But where should you begin? How do you ensure your organization and its leaders take the right steps to achieve and sustain an engaged environment? How do you make engagement practical? Former Gallup expert Stosh D. Walsh provides actionable insights you can apply to "get engagement right" for the long term at your CU.

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

### Interactive HR Forum - Share & Learn Best Practices

Join your peers in this highly engaging discussion forum where you can share and learn solutions to your toughest HR management challenges amid the most chaotic time in nearly a century.

### SUMMIT SESSION DESCRIPTIONS



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



Dave DeFazio. Partner

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.

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

**Derek Laczniak**, CIC, CRM, Partner, Director of Cyber Practice, M3 Insurance

Sponsored by







Carlos Molina, Risk Management 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.

### 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. 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.

### 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.

### Interactive Cybersecurity Forum - Share & Learn Best Practices

Join your peers in this highly engaging discussion forum where you can share and learn solutions to your toughest cybersecurity challenges amid the most chaotic time in nearly a century.

### SUMMIT SESSION DESCRIPTIONS



### Will Indirect Auto Finance Save Your Portfolio: 5 Ways to Build a Successful Indirect Program



Don Bader, Vice President, CRIF Select Corporation





You don't have to be a captive finance company or multi-billion dollar internet bank to run a profitable indirect auto finance program. Indirect auto finance continues to push through the volatile market and help financial institutions grow their portfolios in a time when investments are seeing losses. Get the answers you need to some of your biggest challenges including: How do you balance rates vs reserve? How much risk is too much? What market factors are most important to stay competitive? How can you use indirect auto to gain members and cross-sell? Learn the keys to creating an indirect auto program which fits your institution's goals and culture.

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

Derrick Wiemer, Solution Architect of Portfolio Analytics, nCino

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 profit bility?



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!

### Rev up your Auto Loan Profitability

Matt Roe, SVP, Open Lending, LLC

Sponsored by

• penLending
Say YES to more automotive loans.



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!

### 20 Tactics that can DOUBLE Your Direct 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.



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!



Join your peers in this highly engaging discussion forum where you can share and learn solutions to your toughest lending challenges amid the most chaotic time in nearly a century.

### SUMMIT SESSION DESCRIPTIONS



### 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.

### Helping Main Street Move Forward with Efficient Small Loan Programs

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

The drastic changes in the economy over the last several months mean businesses in your community will need more help than ever in getting back on their feet. So how can your credit union help these businesses with their smaller loan requests while managing PPP loans, assisting existing borrowers with modifications, and assessing the new uncertainties in your commercial portfolio? Join Michael Mucilli, Senior Vice President of CU Business Group, for best practices in developing an effective and efficient small loan program that will maximize your resources to help get businesses in your community the funds they need to move forward.

### 4 Steps to Leverage PPP and Find Growth Opportunities

Jim Pond, Co-founder, James & Matthew

Credit Unions have trailed banks in commercial banking development for what seems like forever. The PPP loan process has opened huge opportunities for the credit unions that are willing to invest the time, talent, and resources to leverage the successes (and failures) of PPP. This talk will cover four key areas, sales, marketing, brand, and the competition, showing you how some fast moves in these key areas will position your credit union to enjoy the benefits of PPP involvement.

https://culeaders.pathable.co Back to table of contents ^

### 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.

### Winning Tactics from America's Leading Commercial Lenders (Part 1) - Building a Winning Combination



Sam Burns, VP Business Services, Purdue FCU

A graduate of Purdue University and Graduate School of Banking at University of Wisconsin, Burns brings nearly 18 years of commercial banking experience to the credit union.

Burns can help businesses increase profitability and improve operating performance through experienced guidance as well as competitive business loans, deposit accounts and services.

He is active in the community, serving on the board for Junior Achievement and Chair of the Major Customers Committee, as well as past co-chair of the United Way of Greater Lafayette's Community Investment Committee.

### Winning Tactics from America's Leading Commercial Lenders (Part 2) - Building Commercial Relationships



Brendan Wiechert, Director of Commercial & Business Services, STCU

Discover how to move from transactional to relationship, from reactive to proactive, and from commodity to transformational in this session. Why? 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.

# Tap into the Power of Payments. Supporting Members Every Day, Every Way. Your Possibilities Delivered.® In today's evolving world, exceeding members' expectations starts with convenience, security, and speed. PSCU's contactless card solution meets all these needs, but it's the service behind the technology that helps you support your members when they need it most. As the nation's premier CUSO, we've been focused on credit unions for more than 40 years. This **PSCU** expertise, combined with a flexible suite of payments solutions, delivers an

experience as unique as your members are. Tap into the power of PSCU.

### **SPONSORS**

### **Alloya**

#### **Gold Sponsor**



Alloya provides critical cooperative services to over 1,400 member credit unions, including investment, financial, lending and correspondent services. Alloya offers a dependable and affordable line of credit, secure and efficient product access and settlement, and unparalleled member service to its members. To learn more, visit: www.alloyacorp.org.

### **CUNA Mutual Group**



#### **Signature Partner**

CUNA Mutual Group is a financially strong insurance, financial technology and investment company. With roots in the credit union movement, we have a generations-long history of working with financial institutions to protect and grow their businesses. We enable our customers to help their customers achieve financial stability through solutions that stay ahead of the pace of today's rapidly changing marketplace. The companies of CUNA Mutual Group offer commercial, personal insurance products; lending solutions; retirement, investment, data and analytics, and marketing services. Learn more at www.cunamutual.com.

### Luse Gorman



#### **Platinum Sponsor**

Luse Gorman, PC is the leading law firm nationally in representing financial institutions, including credit unions, in corporate, mergers and acquisitions (including credit union acquisitions of banks and credit union mergers), charter expansions and conversions, regulatory and enforcement matters, and executive compensation and employee benefits matters. With 18 partners focused exclusively on financial institutions, we have one of the largest financial institution legal practices in the country.

### **Open Lending**



#### **Platinum Sponsor**

Open Lending specializes in loan analytics, risk-based pricing, risk modeling and automated decision technology for automotive lenders throughout the United States. Through its proprietary technology, the Lenders Protection® program provides risk management that features default insurance coverage for near and non-prime automobile loans.

### <u>PSCU</u>



#### **Gold Sponsor**

PSCU, the nation's premier credit union service organization (CUSO), supports the growth of 1,500 credit unions and more than 3.8 billion transactions annually. PSCU's secure business offerings include payment solutions, risk management, digital banking, analytics, loyalty, strategic consulting and mobile platforms. Comprehensive 24/7/365 member support is delivered by PSCU's U.S. contact centers.

### <u>Stearns Financial Group</u>



#### **Platinum Sponsor**

Leverage our expertise to drive yield, supplement retirement, and optimize retention and succession. With over 25 years specializing in executive retention and retirement plans for credit unions, healthcare institutions, higher education, and high-performance non-profits, Stearns Financial has the expertise to design, implement, and administer every type of executive benefit program. Our plans are different because we use process as the driver to achieve effective design. By starting with your organization's mission, goals, and intent we tailor individually for each executive. We are unique in that we can often accomplish this with no accounting cost to the organization, favorable reporting, and tax-free withdrawals.

### EXHIBITOR PARTNERS

### **CRIF Select**



At CRIF Select, We Make Lending Easy! CRIF Select is a leading provider of Indirect Lending solutions. We combine technology and services such as Dealer Management, Paperless Loan Package Processing and expert Consultation to give you all the pieces you need to support your indirect lending programs.

### <u>CSi</u>



Computer Services, Inc. (CSI) delivers core processing, managed services, mobile and Internet solutions, payments processing, print and electronic distribution, and regulatory and compliance solutions to financial institutions and corporate customers across the nation. Exceptional service, dynamic solutions and superior results are the foundation of CSI's reputation in empowering businesses to remain competitive, compliant and profitable.

### **CU Business**



CU BUSINESS News is the only all-digital, all-business resource for credit unions. Our readers are credit union executives, branch managers, credit union personnel and others who need to stay informed and educated about industry news and best practices. Every day (seven days each week), our contributors and publishing team sends new articles packed with information specifically for credit union executives.

### **CUConferences**



For 40 years, credit union CEOs, senior management, directors, supervisory committee members, business development/marketing managers, lending managers and committee members from credit unions across the country attend our conferences to strengthen their knowledge to better serve their members and credit union. To the tens of thousands of you who have attended our conferences over the past 40 years, we say thank you so much for trusting CU Conferences with your educational needs.

### **CU Lending Advice**



Brett Christensen is the owner of CU Lending Advice, LLC. As such, he consults and conducts training sessions on various lending topics to professionals that work in the credit union industry. His personal and entertaining speaking style have also made him a popular and sought out speaker in the credit union industry.

### **Defense Storm**



DefenseStorm is a Security Data Platform that watches everything on your network and matches it to your policies, providing cybersecurity management that is safe, compliant and cost effective. Built from the ground up in the cloud, DefenseStorm unifies detection, investigation, reporting, and compliance into a single place to manage cybersecurity data. Formed by bankers and technology experts, DefenseStorm aggregates event data across all cybersecurity tools and links policies to real-time alerts, so that financial institutions can prove to regulators they are both secure and compliant

### <u>Elan</u>



For over 50 years, Elan Credit Card has offered an outsourced partnership solution that provides credit unions the ability to offer a competitive credit card program. Elan Advisory Services provides strategic consultation to ensure you have the right products and services to compete in your market.

### <u>Fiserv</u>



Fiserv, Inc. (NASDAQ:FISV) aspires to move money and information in a way that moves the world. As a global leader in payments and financial technology, the company helps clients achieve best-in-class results through a commitment to innovation and excellence in areas including account processing and digital banking solutions; card issuer processing and network services; payments; e-commerce; merchant acquiring and processing; and the Clover® cloud-based point-of-sale solution. Fiserv is a member of the S&P 500® Index and the FORTUNE® 500, and is among the FORTUNE Magazine World's Most Admired Companies®. Visit fiserv.com and follow on social media for more information.

### EXHIBITOR PARTNERS

### Greenpath



GreenPath provides holistic financial coaching and education to people nationwide. Over 500 credit unions entrust us to offer financial wellness support to their members. Since 1961, we have been supporting people to pay off debt, improve credit and take charge of their financial lives. People are at the center of everything we do. We are known for our caring, respectful approach. Our goal is to make it easier for everyone to be financially well.

### nCino



nCino is the worldwide leader in cloud banking. Its Bank Operating System improves employee efficiency while enhancing the customer experience for onboarding, loans and deposits across all lines of business. Transforming how financial institutions operate through innovation, reputation and speed, nCino works with more than 1,100 financial institutions globally whose assets range in size from \$30 million to \$2 trillion. A proven leader, nCino is part of the Forbes Cloud 100 and was named the #1 "Best Fintech to Work For" by American Banker.

### **OMFinancial Group**



OM Financial Group is an independent financial services company with offices throughout the country. OM specializes in Credit Union Supplemental Executive Retirement Plans (SERPs), designed to both reward and retain key executives. OM pioneered Collateral Assignment Split Dollar SERPs, helping credit unions offer competitive, cost-effective employee benefit olutions.

### **OnBoard**



OnBoard is useful and simple to use virtual meeting management platform. We did that by consulting with real directors to understand what they need to make board meetings more valuable. Our commitment to adoption and real-world functionality sets OnBoard apart from providers.

### **Trellance**

### trellance

Trellance is the leading provider of data analytics and business intelligence solutions, professional services and consulting for credit unions. The company's solutions and services, together with the patented common data model of its signature M360 product, are used by credit unions to find actionable insights, improve member experience and achieve portfolio growth. Founded in 1989, Trellance is headquartered in Tampa, Fla. and serves more than 1,500 organizations throughout the United States.

### THANK YOU SPONSORS

#### Signature partner



#### Platinum sponsors









#### **Gold sponsors**





#### Media partner



### The Right Resources Make Retirement Planning Easy.

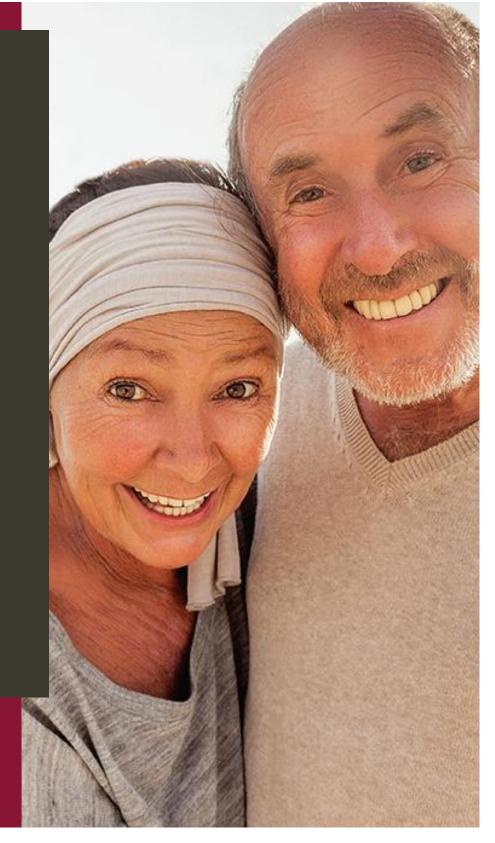
When 49% of workers are living paycheck to paycheck, it's hard for them to save for their futures.

CUNA Mutual Retirement Solutions gives you the power to reverse that trend.
With access to comprehensive financial fitness tools, your retirement plan participants can make informed decisions for the road ahead.

#### Financial Fitness

Help employees go beyond saving for retirement and plan for their overall financial well-being with the Financial Fitness education program on BenefitsForYou.com. They'll have access to unbiased online, interactive instruction in personal finance and investing fundamentals.

To learn more, visit cunamutual.com/retirement.





¹Yahoo finance, 2019

https://finance.yahoo.com/news/49-americans-living-paycheck-paycheck-090000381.html

CÜNA Mutual Řetirement Solutions is a division of ČÜNÁ Mutual Śroup and the marketing name for CPI Qualified Plan Consultants, Inc., a CUNA Mutual Group member company. CUNA Mutual Group is the marketing name for CUNA Mutual Holding Company, a mutual insurance holding company, its subsidiaries and affiliates. Annuity insurance products are issued by CMFG Life Insurance Company, located in Madison, Wisconsin. Each insurer is solely responsible for the financial obligations under the policies and contracts it issues. Securities distributed by CUNA Brokerage Services, Inc. (CBSI), member FINRA/SIPC, a registered broker/dealer, 2000 Heritage Way Waverly, Iowa 50677, toll-free 866.512.6109. Non-deposit investment and insurance products are not federally insured, involve investment risk, may lose value, and are not obligations of or guaranteed by the financial institution. Representatives offer retirement and investment education but do not provide investment, legal or tax advice. Participants are encouraged to consult their own advisors.

### SAVE THE DATE

### Join us in-person in 2021 at



### The Mirage

Las Vegas July 27-30, 2021



### LOCK IN YOUR SPECIAL DISCOUNT!

Reserve your seats for the 44th CU Leadership Convention &

SAVE up to \$300 per person for 2021

No obligation. No risk.

Reservations due by August 6, 2020 at 5 pm EDT

Check for an email on Friday, July 31st to Sign-Up and Lock In Your Special Discount!