

JOIN THE NATION'S MOST INNOVATIVE CREDIT UNION LEADERS AT...



LEADERSHIP CONVENTION

DISCOVER.
EXPERIENCE.
GROW.

JULY 19-22, 2022 CAESARS PALACE

Las Vegas

WE'RE BACK!

LIVE

AND IN-PERSON!



FEATURING 60+ CU EXPERTS & THOUGHT-PROVOKING SPEAKERS INCLUDING...



SIGNATURE PARTNERS



strategycorps

SAVE UP TO **\$300 PER PERSON**
WHEN YOU SEND **7+ ATTENDEES**

DISCOUNT
CODE:
CU2022



CULeaders.com



866-620-5937

The 45th CU Leadership Convention is BACK!

We are LIVE and IN-PERSON!

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

You and your entire leadership team are invited to the #1 event for America's credit union leaders.

After two years of social distancing and virtual events, we are proud to announce that the **45th CU Leadership Convention** is returning to **Caesars Palace, Las Vegas, July 19-22, 2022** where we can meet once again to share ideas, network and learn from the country's most innovative minds!

Plus, we are offering up to **\$300 off** when you register TODAY! **The more people you send, the more you SAVE!**

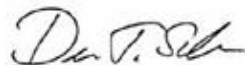
Every year is special. But there is nothing more special in our 45-year history than this year's convention. To celebrate, we are bringing back our **All-Time Highest-Rated Speakers** and we are showcasing the CU movement's rising stars. This is one event you will not want to miss.

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

- > **50+ 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 compelling story for your CU.
- > Choose **1 of 4 ALL-NEW! Deep-Dive Pre-Conference Workshops** on hot topics including Leveraging Big Data ... Financial Management ... Supervisory Committee Best Practices ... and new methods of Strategic Planning.
- > Every day, we kick off the convention with inspiring keynote speakers.
- > And get ready for an evening of fun-filled laughs with **legendary comedian Louie Anderson** to cap off our opening day!

See you in Vegas!



Dennis J. Sullivan,
Convention Chairman

“I will forever be changed for the better as a board member! I feel invigorated and motivated to share the ideas and content I discovered at the CU Leadership Convention.”

— GRACE LOWE, BOARD MEMBER, CU SO CAL

“The CU Leadership Convention is a top notch destination for obtaining both leading edge tools and a future looking perspective.”

— TED CELENTINE, BOARD TREASURER, UNITED HEALTH CU

Whats New for 2022!

SAVE UP TO

\$300

REGISTER BY
MARCH 4, 2022

DISCOUNT CODE:
CU2022

**BAR
RESCUE**



Keynote Speaker
Jon Taffer



Master Storyteller
Matthew Luhn



Comedian
Louie Anderson



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.

- › Financial Summit
- › Marketing & Branding Summit
- › Human Resources Summit
- › Leadership Summit
- › Lending Summit
- › Fintech Summit
- › Cybersecurity Summit

See an
incredible
line-up of
SPEAKERS!

**ONE TICKET =
ALL SESSIONS**

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

Join former Pixar animator and master storyteller, Matthew Luhn, in a special small-group workshop as he teaches you how to harness the power of a good story to connect and engage with your market. Author of *The Best Story Wins*, Matthew gives you the same powerful techniques he has shared with companies like Salesforce, Google (four times at Google in 2019!), Udemy, Gartner, Charles Schwab, Target, Lego, Sony, Facebook, Adidas, Expedia, Hilton, LinkedIn, Bath & Body Works, Microsoft and Apple. Separate registration required. **Limited to the first 100 registrants.**

**HALF-DAY
WORKSHOP**



SAVE UP TO **\$300 PER PERSON**
WHEN YOU SEND **7+ ATTENDEES**

DISCOUNT
CODE:
CU2022



CULeaders.com



866-620-5937

Keynote Speakers



John Taffer
CELEBRITY CHEF FROM BAR RESCUE

Raise the Bar: An action-based method for maximum member experiences

Jon Taffer is an international celebrity and New York Times best-selling author, but most people know him as the highly sought-after guru who takes a no-holds-bar approach to help businesses reach their full potential as creator, executive producer and star of Bar Rescue. Taffer guides companies through the process of turning around their businesses to embrace the future. He has consulted for well-known brands, such as the NFL Network, Ritz-Carlton Hotels, Buffalo Wild Wings, and Anheuser-Busch to name a few. Taffer is a master of powerful presentations that rescue businesses from themselves to propel them towards success.



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.



Patrick Adams
ST. LOUIS COMMUNITY CU

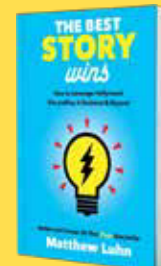
Jeopardy! It's not just a game show

Jeopardy, the game, is all about strategically managing risk and reward. The same is true for credit unions. Come play along with the "Alex Trebek of Credit Unions," Patrick Adams, as he discusses the hottest topics on the playing board including Corporate Culture, Competition, Digital Solutions, Member Experience, Financial Strength, Market Relevancy, Sustainable Growth, and Brand Strength as he reveals what's working in each category to help your CU better compete. Just like the hit TV show, this session will be fast-paced and fun with Patrick delivering one proven idea after another for your credit union to come out ahead of the game.



SPECIAL HALF-DAY WORKSHOP

Storytelling for Business Workshop with Hollywood Animator Matthew Luhn



SEPARATE REGISTRATION REQUIRED. LIMITED TO THE FIRST 100 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.

AGENDA-AT-A-GLANCE

TUESDAY, JULY 19, 2022

10:00 am - 5:00 pm Convention Registration Opens
1:00 pm - 4:00 pm Pre-Conference Workshops

WEDNESDAY JULY 20, 2022

7:00 am – 8:45 am Exhibit Hall Opens & Continental Breakfast
9:00 am – 10:00 am Opening Keynote: Jon Taffer on Leadership in Challenging Times
10:00 am – 10:30 am General Session – Leadership Roundtable
10:30 am – 11:00 am Networking Break in Exhibit Hall
11:00 am – 11:10 am Leadership Awards
11:10 am – 12:00 pm General Session: 6x6 – 6 Speakers Sharing their Best Ideas
12:00 pm – 12:30 pm Networking Luncheon
12:30 pm – 1:15 pm Networking and Dessert in Exhibit Hall
1:15 pm – 1:40 pm Breakout Summits Sessions
1:50 pm – 2:20 pm Breakout Summits Sessions resume
2:30 pm – 2:55 pm Breakout Summits Sessions resume
2:55 pm – 4:00 pm Happy Hour in the Exhibit Hall
7:30 pm – 8:30 pm Opening Night Entertainment: Louie Anderson!

THURSDAY JULY 21, 2022

7:30 am – 8:45 am Continental Breakfast in Exhibit Hall
Breakfast of Champions
9:00 am – 9:45 am Keynote Address: Matthew Luhn
9:45 am – 10:00 am General Session: 2 Minute Spotlight
10:15 am – 11:00 am Breakout Summits Sessions resume
11:00 am – 11:45 am Networking Break in Exhibit Hall
11:45 am – 12:30 pm Roundtable Discussions & Breakout Summit Sessions
12:30 pm – 1:00 pm Networking Luncheon
1:00 pm – 1:45 pm Networking & Dessert in Exhibit Hall
1:45 pm – 2:15 pm Breakout Summits Sessions
Storytelling & Branding Workshop with Matthew Luhn
2:30 pm – 3:00 pm Breakout Summits Sessions
Matthew Luhn Workshop (continues)

FRIDAY JULY 22, 2022

7:30 am – 9:00 am Buffet Breakfast
9:00 am – 10:00 am General Session: Keynote TBA
10:00 am – 11:00 am General Session with Patrick Adams
Jeopardy: It's not just a game show!
11:00 AM Adjourn

Breakout Summits

Featuring 60+ SPEAKERS & 50+ SESSIONS.

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



MARKETING & BRANDING SUMMIT

Transforming a brand: How to break through barriers, create real change & align to the future

Everyone talks about change. But the reality is that change is uncomfortable, disruptive and often downright scary. Find out how to transform your brand and get the buy-in you need from the boardroom to the front-lines and from your members to your partners in this eye-opening session. Discover the secrets (and the hard lessons learned!) from Tricia Szurgot, Chief Operating Officer and former CMXO at First Commonwealth FCU, who helped turn branches into financial centers, drive growth fueled by social responsibility, and nearly doubled the size of the CU to \$1 billion in a fiercely competitive market.



Speaker: Tricia Szurgot, MBA & Certified Futurist - Chief Operating Officer, First Commonwealth FCU

LEADERSHIP SUMMIT

7 rules highly profitable credit unions use to measure DEI

Consumers demand it. Employees expect it. And organizational leaders must demonstrate it. Yet, Diversity, Equity and Inclusion have not moved beyond traditional training programs. What's needed is a cultural shift or else credit union leaders will be stuck reacting to controversial DEI challenges.



CUs that are making the cultural shift are seeing higher productivity, increased efficiency and a significant boost to the bottom line. Join one of the CU Leadership Convention's Top Speakers, Ronaldo Hardy, as he reveals the 7 rules to the road highly profitable CUs use to manage and measure DEI and its impact to their organizations.

Speaker: Ronaldo Hardy, Chief Diversity and Inclusion Officer, Owner at CU Strategic Planning

LENDING SUMMIT

The robots are coming! Machine learning/AI in consumer lending

AI is taking over more loan decisions as human beings gradually cede control. What does this mean for your CU? What is the impact to your lending portfolio? And how might it affect your delivery channels?



In this impactful session, Don Arkell from CU Lending Advice will discuss how AI is taking over lending decisions and the challenges presented to credit unions. We will cover:

- > How ML/AI replicates a loan decision
- > Extending your credit risk appetite across space and time
- > Regulatory concerns and challenges
- > The metrics you need to analyze
- > The problems AI can create for you and your members -- and how to avoid them

Speaker: Don Arkell, Owner, CU Lending Advice, LLC

FINTECH SUMMIT

A brand-new world of Fintech, investment and digital innovation

For years, super-funded Fintech and Big Banks have been gaining a competitive edge by spending billions of dollars creating cutting-edge, digital solutions while CUs have struggled to keep up.

Curql is working to change that. With its \$252 million investment fund backed by investments from 69 limited partners, Curql serves a gateway for Fintech and CUs to collaborate and develop new digital and AI solutions. The goal is to bring transformative technology to market so more CUs can stay relevant in the evolving digital market and compete. Discover the trends that are shaping the newest digital innovations and the emerging solutions coming to market that may benefit your CU and your members.



Speaker: Nick Evens, President & CEO, Curql Collective, LLC

FINANCIAL SUMMIT

Ensuring a successful M&A deal

As the COVID-19 pandemic settles, M&A activity by and among CUs is poised to heat up and, perhaps, exceed pre-pandemic levels. Financial stress and the lack of succession among smaller, struggling CUs will increase merger activity among CUs. Less opportunities for community banks to find merger partners will fuel more bank acquisitions by CUs. Whatever side of the transaction you may be on in a M&A deal, you will not want to miss this session as we explain the Big 4 Strategies for an Effective M&A transaction. Receive valuable insight regarding (1) why a credit union would want to merge, including acquiring a community bank; (2) the planning phase of a M&A transaction, including key deal points and pricing considerations; (3) the various stages of a transaction, including how to properly conduct due diligence, negotiate the merger agreement and successfully receive regulatory approval; and (4) how to effectively utilize subordinated debt to enhance regulatory capital ratios and use it as a funding source to acquire a community bank.

Speakers: Larry Spaccasi, JD, Partner, Luse Gorman, PC; Jeff Cardone, JD, Partner Luse Gorman, PC

SPONSORED BY



MARKETING & BRANDING SUMMIT

Big three MX strategies for better results for your CU & your members

Fortune 1000 companies focused on Customer Experience (CX) are now generating 5.7x more revenue compared to competitors and their customers are 5x more likely to purchase from them. Yet, only a fraction of CUs are pursuing similar Member Experience (MX) initiatives, which are now more critical than ever in the digital era. Based on work with 120 CUs, David Dean shares the Big Three MX Strategies for CUs to (1) build referrals, (2) increase engagement and, (3) improve the digital experience for members. Plus, you won't want to make a move until you follow David Dean's #1 secret to create an effective MX strategy in your CU.

Speaker: David Dean, COO, Marketing Solutions at CU Solutions Group



MARKETING & BRANDING SUMMIT

Values-based branding: The secret to creating enduring & authentic relationships with members

If you are leading with messages of lower loan rates, less fees and higher deposit rates you're missing 4 out of 5 prospects in your market. Instead, lead with your values. Prior to the pandemic, 64% of consumers wanted to do business with companies that share the same values. Today, that figure is now 78% as more millennials and Gen Z'ers dominate the market. Find out how brand managers at CUs are moving away from product-centric messaging and creating effective value-based, customer-centric campaigns that are now increasing member loyalty, member engagement and even employee engagement.

Speaker: Amanda Thomas, Founder & President, TwoScore, LLC



LEADERSHIP SUMMIT

Big data & the ONE thing you can do that will matter most

CUs have more data about their members than Amazon! But more data is not the answer to the challenges facing CUs. The answer lies in harnessing the power of Big Data. What if there is ONE thing to focus on in your data that would matter most? Join veteran data educator and strategist, Anne Legg, as she reveals in plain-English a 3-step framework to help you identify, analyze and build a roadmap towards the ONE thing that will deliver extraordinary results for your members – and your CU! Best of all, no additional resources are required.

Speaker: Anne Legg, Founder, THRIVE Strategic Services



FINANCIAL SUMMIT

Bill Hampel's economic outlook for 2022 & beyond

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. Find out what factors might impact economic growth ... consumer spending ... interest rates ... inflation ... unemployment and more. Plus, find out first-hand how your CU's loan demand, savings flows and earnings may be affected – and how these economic trends may affect member behavior.

Speaker: Bill Hampel, Economist



HUMAN RESOURCES SUMMIT

Where do we go from here? Practical answers to create a commitment to change for all

Look at the boardrooms and C-suites across the country and it's clear – a diversity challenge exists. Despite decades of incremental progress, minorities are under-represented in the C-suite. Just a fraction of the top positions at the \$1 billion+ CUs are held by women. And Latinos continue to be disproportionately affected. Find out how top-performing CUs are making the commitment DEI to give their organizations a competitive advantage. Plus, discover the skills needed to create cultural competency among your leaders.



Speaker: Renee Sattiewhite, President & CEO, African-American Credit Union Coalition; owner of Sattiewhite Training Productions

MARKETING & BRANDING SUMMIT

Niche marketing made simple: 3 steps to generate 20% YoY growth in any channel

Join one of the world's leading digital marketing advisors and best-selling author James Robert Lay discuss how to find ideal market segments, build a brand within your niche and cultivate highly profitable relationships whether you're marketing online, over the air, in-person or in the mail. See for yourself how other CUs are generating 20% growth rates YoY using the Digital Growth Institute's 3-Step Niche Marketing Formula.



BONUS: Every attendee also receives a digital version of James Robert Lay's new book, *Banking on Digital Growth*.

Speaker: James Robert Lay, CEO, Digital Growth Institute and author of the best-seller, Banking on Digital Growth

LEADERSHIP SUMMIT

Leading an organization that matters

Purpose makes a difference. CU leaders who understand why their organization exists in the market, who it serves best, and how it makes a difference, outperform their competitors in just about every category. Those with a purpose-driven culture generate profits 10x – 12x more than their competitors.



Get the same strategies the country's top CUs are using to create a purpose-driven organization and delivering amazing results.

Speaker: Tim Harrington, CPA & President, TEAM Resources

FINANCIAL SUMMIT

Financial Roundtable: Lessons learned from the top performing CUs & the tactics you can apply

Get ready to jot down one action item after another in this high-energy discussion as you explore the tactics of the Top Performing CUs – and how you can apply them at your CU. Find out how the Top 1% do it – and how you can too! You will learn about the strategic choices that were made ... how CFOs manage their balance sheets in unpredictable times ... and the 6 paths CUs must consider for continued growth. This hands-on, interactive discussion led by CU finance expert Pete Duffy, will give you the tools you need based on what's working among the country's top CUs.



Speaker: Peter Duffy, Managing Director, Piper Sandler and board member of NACUSO and AKUVO

FINTECH SUMMIT

Close encounters of the Fintech kind: Research, trends & live demos of the newest financial apps

See live demonstrations of trending apps like RobinHood, Cash App, SoFi, and Affirm to better understand the increasing competitive pressures on today's banking products. Join Dave DeFazio, one of the CU Leadership Convention's highest-rated speakers, as he shares the newest Fintech research that explains the rapidly changing trends - including which mobile features matter most to each generation, from Zoomers to Boomers. He will also examine how fintech companies like Acorns are leveraging the subscription society (think Amazon Prime, Costco, Netflix, Spotify) and pioneering new business models for financial products and services.



Speaker: Dave DeFazio, Partner, StrategyCorps

SPONSORED BY **strategycorps**

LEADERSHIP SUMMIT

The Big 3 skills needed for the CU executive of the future

What does the executive of the future look like? Is it someone with thousands of Twitter followers who can move the needle with a Tweet? Is it someone who can talk financials one moment, digital marketing the next, data analytics over Zoom, and then make deals over lunch?



Or is it someone with an old-school work ethic who is focused on innovative fintech solutions? Join John Janclaes, retired President & CEO of Partners FCU and now President of Nymbus CUSO, as he shares the Big 3 skills that executives need – and boards should look for – to create the growth and innovation credit unions must have to compete in the future.

Speaker: John Janclaes, President, Nymbus CUSO

SPONSORED BY  NYMBUS®

FINTECH SUMMIT

Embracing Fintech collaboration: Leveling the playing field for CUs

Credit union members expect personalized digital experiences in the channel of their choice – yet some traditional financial institutions are not meeting these table stakes. Previously, credit union dialogue around innovation was focused on two options: buy or build. Today, there are more options – including partnerships with Fintechs, which can play a critical role in growing the bottom line and enabling true innovation. Leveraging third-party resources can also be hugely beneficial in accelerating time to market for launching new innovations – filling gaps your members may not even know exist and creating value. Learn how Fintechs are reshaping the future of financial services and how embracing collaboration can help level the playing field for credit unions.

Speaker: Brian Scott, Chief Growth Officer, PSCU

SPONSORED BY  PSCU®

HUMAN RESOURCES SUMMIT

DEI lessons learned and practical strategies to support cultural change

WARNING: If your DEI initiatives are considered an HR function, you're setting yourself up for failure. This is just one of the many lessons learned as well-intentioned C-suite leaders and directors implement DEI programs at CUs of all sizes. Find out what role HR should play and how to avoid the mistakes others make from one CEO who discovered that the highest turnover was among its black employees despite years of DEI trainings and initiatives. Plus, find out how to handle members who don't support DEI initiatives and how best to respond. Hint: The customer isn't always right! Join us for this practical, no-nonsense session so you can support cultural change in your CU and in your community.

Speaker: Tonita Webb, President & CEO, Verity Credit Union



FINANCIAL SUMMIT

Top 4 financial strategies every CU must consider in a post-COVID economy

As unemployment rates stabilize, consumer spending recovers, interest rates begin to rise, and net interest margins get squeezed, how should CUs adjust in a post-COVID economy? Join ALM First's Emily Hollis as she reveals the top 4 financial strategies every CU must consider including pricing loans ... the "secret sauce" in your ALM reports ... leveraging derivatives ... and investing opportunities to seize (and those to avoid!) Plus, you'll get Emily's "Picking up Pennies Tips" – small things that can yield significant income over time.

Speaker: Emily Hollis, Owner, ALM First



LENDING SUMMIT

Keys to growing your loan portfolio organically

Too many CUs are relying on mergers, participations, and indirect lending as their primary growth engine. The problem is that this strategy is short-sighted. It dilutes your brand equity and gives up market share to your competitors. The solution: Grow your loan portfolio from within by leveraging enterprise risk management, marketing, and the technology your CU needs. Those that do are seeing significant gains in brand equity, membership growth, and checking growth as they capture a larger share of the market. In this engaging conversation, Ancin Cooley shows you step-by-step how to grow organically and give your CU an edge in the most challenging markets.

Speaker: Ancin Cooley, Principal, Synergy Credit Union Consulting



LEADERSHIP SUMMIT

Enduring Brands: How CUs are "living the mission" & winning hearts and minds

Want to differentiate your brand? Look no further than your own mission. In a world where social issues and values mean more to the next generation of consumers, some of the country's top CUs are creating common bonds that run deeper than where people might live, work or worship. In this fast-paced and energizing session, credit union evangelist Susan Mitchell, shows how CUs are gaining a competitive edge over Big Banks and Fintechs by creating purpose-driven, values-based cultures and are connecting with new and emerging markets like never before.

Speaker: Susan Mitchell, CEO, Mitchell, Stankovic & Associates, & Herb Wegner Outstanding Individual Lifetime Achievement Award Winner



Pre-Conference Workshops



Anne Legg
FOUNDER,
THRIVE STRATEGIC SERVICES

HOT TOPIC #1

Leveraging big data to create value for you & your members

CUs are investing in data analytics at a record level. Yet, most are struggling to gain any real value from their investment. The good news is that you already have access to much of the data you need to gain a competitive edge.

Find out how using the winning approach from Anne Legg's playbook as she reveals how to leverage your data to identify new revenue sources, reduce member friction and increase productivity. Get the same tactics other CUs are using to harness their data that have generated \$1.7 million in new loan balances ... increased ROA to 0.92% from 0.65% ... and decreased net charge-offs to 0.41% from 0.625%.

Using a hands-on, small-group roundtable format, participants will get an opportunity to take home their own playbook they can begin to put to work right away. Plus, every attendee also gets Anne Legg's THRIVE Resource Kit and her Top 10 Data Analytics Tools.



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 19, 1:00 - 4:00 pm.



Ancin Cooley

FOUNDER AND PRINCIPAL OF SYNERGY
CREDIT UNION CONSULTING, INC.

HOT TOPIC #3

Supervisory committee deep dive: Planning, execution, and evaluation

Supervisory committee members often find themselves stuck between two opposing forces. On one side, you must provide strong internal audit functions so the CU can take on risk in a safe and sound manner. On the other, your role should serve as an asset and not a hinderance. In this unique session, Supervisory Committee members will learn how to:

- Strike a balance as auditor and as an asset to the CU.
- Communicate effectively with management, board members, external auditors and regulators.
- Apply best practices for managing and correcting audit findings.
- Prepare for new and evolving regulatory hot button issues before your next exam.
- Create and manage an internal audit plan that you can use keep everyone on track.
- Assess the effectiveness of the supervisory committee processes.
- And much more.

Whether you are a veteran or just getting started, this session will give you practical guidance and insights based on years of best practices from top performing CUs – and from Ancin Cooley's 10 years of experience as an CU consultant, educator, and examiner.



Tricia Szurgot

MBA AND CERTIFIED FUTURIST -
CHIEF OPERATING OFFICER, FIRST
COMMONWEALTH FCU

HOT TOPIC #4

A new model for strategic planning through a futurist lens

As we learned from the pandemic, traditional methods of strategic planning do not work when dramatic social, economic and cultural events quickly unfold. Most strategic planning is based on what has already happened, but the past is not a predictor of the future.

Introducing a new method of strategic planning for an uncertain future that some of the most innovative CUs are beginning to apply. In this one-of-a-kind session, you will learn to think like a futurist and begin to develop a vision for 2030 at your CU. You will get:

- 4 different scenarios of what is likely to occur in the coming decade.
- Strategies you can use to help get your executive team and directors anticipating future challenges – and opportunities!
- How to blow up your traditional planning sessions and adopt a new approach that will truly guide your CU for years to come.

Plus, every attendee gets a One-Page Strategic Plan Template that includes a scorecard with 9 key metrics ... 3 enterprise goals ... 3 strategic initiatives ... and the KPIs you can use to track your CU's performance.

Venue Information

Join us at the beautiful,
newly renovated

Caesars Palace

The iconic Caesars Palace Las Vegas just completed a \$100 million renovation of its Palace Tower, the resort's largest tower, featuring stylishly designed guest rooms and suites. The renovation is the latest in a series that also features a redesigned grand lobby and upgrades to more than 90% of its rooms at a price tag of \$1 billion. See for yourself the luxury and unique designs that await your stay.

Caesars Palace Las Vegas

3655 Las Vegas Boulevard South
Las Vegas, NV 89109

HOTEL DEPOSIT & CANCELLATION POLICY:

All reservations must be guaranteed with a deposit for the first night's guestroom and tax charge. If reservation is guaranteed to a credit card, the first night's guestroom and tax charge (if applicable), per guestroom, will be billed immediately to the cardholder's account. Any reservations made via the telephone call center will be assessed a fee of \$15.00 plus current sales tax, per reservation. This fee will not apply to reservations made via the internet.

Room cancellations without penalty must be made at least 72 hours (3 days) in advance of the scheduled arrival date. Hotel check in time is 4:00 pm. Check out time is 11:00 am.

ROOM RATE: \$179 per night / \$20 per night resort fee

HOTEL CUT-OFF DATE: June 23, 2022

RESERVATION CENTER: (866) 277-5944

(Note: each reservation made by phone is assessed a \$15 fee. Room booking code is: **50240427**)

BOOK YOUR STAY HERE AT THE CONVENTION DISCOUNT RATE

book.passkey.com/e/50240427

Questions? Need Assistance?

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

Our customer service team is
available M-F, 9 am–5 pm EST



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

Louie Anderson

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



Guest Experience Packages

CHOOSE 1 OF 2 OPTIONS
THURSDAY AFTERNOON, JUL 21

PACKAGES INCLUDE

- One admittance to either the **Backstage Legends in Concert Tour OR Casino Gaming Made Fun & Easy!**
- One admittance to one of the 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



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

2 CASINO GAMING MADE FUN & EASY!

Experience gaming in Vegas with decorative playing chips! Enjoy a live lesson of some of the most popular Casino games in Las Vegas including classic Blackjack, Poker, Craps and even take a spin at the Roulette table



Sponsors & Exhibitors

The ALL-NEW 45th CU Leadership Convention will be BIGGER, BETTER & BOLDER than ever with more innovative & thought-provoking speakers ... more world-class entertainment ... and more practical guidance uniquely designed to solve your toughest challenges & inspire you to achieve more.

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

#1

SHOWCASE YOUR COMPANY'S SOLUTIONS TO SOLVE CREDIT UNION CHALLENGES

#2

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

#3

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

#4

ENSURE YOUR SOLUTION BECOMES A VALUABLE ASSET IN CREDIT UNIONS NATIONWIDE

#5

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

1 OUT OF 12

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

SHARING BEST-PRACTICES AND PRACTICAL SOLUTIONS

SIGNATURE PARTNERS



strategycorps

GOLD SPONSOR

LUSE GORMAN

PLATINUM SPONSOR



For more information
contact **Lawrence Dvorchik**



lawrence@culeaders.com



(646) 545-4429



LEADERSHIP CONVENTION

7/19/22 • CAESARS PALACE, LAS VEGAS

**DISCOVER.
EXPERIENCE.
GROW.**



✓ YES! Sign us up for the 45th 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
\$1,395 \$1,195*	\$495	\$295	\$495 \$395*

* Expires March 4, 2022. After this date, registration may be listed at the regular price.

✓ YES! Our CEO wants to join us.

Full conference registration July 19-22, 2022.

CEO CONFERENCE REGISTRATION	PRE-CONFERENCE DEEP-DIVE HOT TOPIC WORKSHOPS	STORYTELLING FOR BUSINESS WORKSHOP	GUEST REGISTRATION
595 \$495*	\$495	\$295	\$495 \$395*

3 Ways to Register

- www.CULeaders.com
- CALL 866-620-5937
- 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:

Our cancellation and substitution policy are as follows: If you're unable to attend, you're welcome to send a substitute. Or, if you cancel in writing by Thursday, May 5, 2022, 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.

SPECIAL GROUP PRICING!

SAVE UP TO \$300 PER ATTENDEE WITH OUR GROUP DISCOUNTS.

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

1-3 ATTENDEES:	4-6 ATTENDEES:	7+ ATTENDEES:
Attendee Rate is \$1,195	Attendee Rate is \$1,145	Attendee Rate is \$1,095
SAVE \$200 EACH!	SAVE \$250 EACH!	SAVE \$300 EACH!

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



LEADERSHIP CONVENTION

DISCOVER.
EXPERIENCE.
GROW.

SAVE UP TO

\$300

REGISTER BY
MARCH 4, 2022

DISCOUNT CODE:
CU2022

Featuring **7 BREAKOUT SUMMITS** with
more than **50 THOUGHT-PROVOKING
SESSIONS** from **60 EXPERT SPEAKERS!**

ONE ticket to the convention gives
you an **ALL-ACCESS PASS** to ALL
BREAKOUT SUMMITS. Pick and
choose from dozens of
terrific sessions.



2022 CU LEADERSHIP SUMMIT

- Discover the Big 3 skills needed for future executives.
- Apply the same strategies that generate 10-12x returns.
- Find out how to leverage Big Data simply and easily.

2022 CU FINANCIAL SUMMIT

- Find out where the economy is headed over the next 18 months.
- Get the top 4 financial strategies every CU must now consider.
- Discover the financial tactics of the Top 1% you can use.

2022 CU FINTECH SUMMIT

- See for yourself which apps are gaining traction among Zoomers to Boomers.
- Get insights on the newest innovations that can benefit your CU and your members.
- Discover how to use Fintech to give your CU a competitive edge.

2022 CU HUMAN RESOURCES SUMMIT

- Get the latest tactics to recruit and retain your top talent.
- Find out how to apply proven DEI strategies to create real, sustainable change.
- Build a member-focused culture.

2022 CU MARKETING & BRANDING SUMMIT

- Create an enduring brand with a purpose-driven, values-based culture.
- Take home 3 steps to generate 20% YoY growth.
- Get the Big 3 MX strategies that are producing 5.7x more revenue.

2022 CU CYBERSECURITY SUMMIT

- Discover the newest tools to protect your members' data.
- Implement proven strategies to bridge fraud & cybersecurity.
- Identify threats, mitigate risk and apply the newest solutions.

2022 CU LENDING SUMMIT

- Get step-by-step guidance to grow organically.
- Learn the key metrics to analyze your loan portfolio.
- Book 20%–40% more auto loans.

SAVE UP TO **\$300 PER PERSON**
WHEN YOU SEND **7+ ATTENDEES**

DISCOUNT
CODE:
CU2022



CULeaders.com



866-620-5937