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# 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 **\$200 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 magicians Penn & Teller** 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!

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**BAR  
RESCUE**



Keynote Speaker  
**Jon Taffer**



Master Storyteller  
**Matthew Luhn**



Comedians  
**Penn & Teller**



## 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.**

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# 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

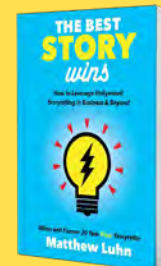
Jeopardy, the game, is all about strategically managing risk and reward. The same is true for credit unions. Come play along with the "Alex Trebek of Credit Unions," Patrick Adams, as he discusses the hottest topics on the playing board including Corporate Culture, Competition, Digital Solutions, Member 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: Penn & Teller

### 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

## 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**

## 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**

## MARKETING SUMMIT

### Top 10 Tactics to Take Your Social Media Marketing to the Next Level

The pressure to deliver an ROI on your social media marketing is intense. That's why you won't want to miss this powerful session and uncover new and emerging strategies to get your message in front of the right people at the right time whether your goal is increasing membership, product sales or profitability. Take away practical strategies you can use on Facebook, Instagram, TikTok, and YouTube to create more exposure, engagement, and sales among your members. Leverage the same winning tactics that are helping other CUs increase mortgage loans 35%, boost auto lending 100% in 12 months, drive up debt consolidation loans 215% in 2021 and much more. These are practical, real-world tactics you can use right away.



**Speakers: Matt Maguy, Co-Founder, James & Matthew; Laurie Busby, Managing Partner, James & Matthew**

## 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**

## 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 struggle 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. 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; (3) the various stages of a transaction; 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**

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## LEADERSHIP SUMMIT

**Future-proof your board: How CU Leaders must adapt in the new normal**

Understanding what motivates and drives your Board of Directors will help to engage them in your strategic initiatives. Credit unions must develop volunteers to be more flexible, imaginative, and accountable to capitalize on their capacity while maintaining fiduciary responsibility. I'm this session, Dr. B will share governance lessons and real-life stories to energize the future while creating a legacy for those that have dedicated their lives to your credit union. As we all forge the new normal, there are evolving challenges for Boards and CEOs. How does the Board adapt?



**Speaker: Brandi Stankovic, Ed.D., COO / Chief Strategy Officer, CU Solutions Group**

## LEADERSHIP SUMMIT

**The Deposit Dilemma: What to do**

It's important to understand Alternative Fundir Employee Benefits and Charitable Donations. Credit unions are increasingly investing in non-703 and 704 instruments for clear reasons. Learn how your credit union can strategically fund its benefit obligations through options including BOLI, annuities, and even stocks and bonds. You'll see how to manage the additional risk to potentially increase your return on assets. This overview includes the steps you need to take to create a well-documented, compliant program that fits within your credit union's risk tolerance parameters.



**Speaker: Andy Roquet, Executive Benefits Specialist, CUNA Mutual Group**

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## 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**

## 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 Arkel 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

**Speaker: Don Arkel, Owner, CU Lending Advice, LLC**

## MARKETING &amp; 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 &amp; 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**

## 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 &amp; 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

**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

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## 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

## 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

## 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 grow organically and give your CU an edge in the most challenging markets.

**Speaker:** *Ancin Cooley, Principal, Synergy Credit Union Consulting*

## 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*

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## HR SUMMIT

### Win the battle for talent: How culture can be your most powerful weapon for good

What if your culture became your competitive advantage for retaining employees? What if potential employees considered your CU to be their preferred employer? Find out how one of the country's oldest CUs recently overhauled its corporate culture to create the "Workers Way" - a member-centric approach to doing business that is helping employees provide for their families, build financial resilience for members and improve their community. The results are impressive. Workers CU's staff turnover is among the lowest in the country ... millennials and Gen Z'ers now account for its largest users ... and its Combined Aggregate Growth Rate is well above its peers at 28%. Discover the keys to win the war for talent by doing good.



**Speaker:** *Robert "Bob" Lockett, CSO & SVP Diversified Services, Workers CU*

## 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*

## HR SUMMIT

### Workplace cohesion: The key for CU leaders to close the door on the Great Resignation

Millions have already left the workforce and nearly 63% of those who remain are actively searching for a new position. Credit unions can no longer afford to settle for mere "employee engagement" based on a hunch, happiness, or satisfaction. Dr. Troy makes the case that to have the type of commitment leaders want from their employees it takes cohesion — not engagement. Cohesion Cultures™ are safe workplaces where people feel a sense of belonging, are valued and share in mutual commitments. When cohesion is present, teams always perform. Join Dr. Troy as he brings this level of cohesive performance to life with knowledge and activities that can be implemented immediately in your CU.



Note: Be sure to join Dr. Troy at Thursday's HR Roundtable Discussion where attendees have the opportunity to develop an action plan to help retain your top talent.

**Speaker:** *Troy Hall, Ph.D., author and talent retention consultant, and former Chief Strategy Officer at South Carolina, FCU*

## 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*

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**New sessions added every week.**  
Go to [www.CULeaders.com](http://www.CULeaders.com) for live updates

# 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.

### 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 hindrance. 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.



**Ancin Cooley**

FOUNDER AND PRINCIPAL OF SYNERGY  
CREDIT UNION CONSULTING, INC.

### 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.



**Tricia Szurgot**

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



# 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](http://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





Plus, enjoy Las Vegas' legendary duo,

## Penn & Teller!

This is an exclusive benefit available ONLY to convention or guest registrants.

Get ready for a spellbinding open-night reception by one of most-beloved headline acts in Las Vegas history, as Penn & Teller continue to defy labels—and at times physics and good taste—by redefining the genre of magic and inventing their own very distinct niche in comedy.

## Guest Experience Packages

CHOOSE 1 OF 2 OPTIONS  
THURSDAY AFTERNOON, JUL 21

### PACKAGES INCLUDE

- One admittance to either the **Liberace Museum Collection at Thriller Villa** OR **Casino Gaming Made Fun & Easy!**
- One admittance to our Opening Night Entertainment — Las Vegas' legendary duo, Penn & Teller!
- 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

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For more information  
contact **Lawrence Dvorchik**



[lawrence@culeaders.com](mailto: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
<del>\$1,395</del> \$1,295*	\$495	\$295	\$495

\* Expires May 1, 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	\$295	\$495

## SPECIAL GROUP PRICING!

**SAVE UP TO \$200 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 \$1,295	Attendee Rate is \$1,245	Attendee Rate is \$1,195
<b>SAVE \$100 EACH!</b>	<b>SAVE \$150 EACH!</b>	<b>SAVE \$200 EACH!</b>

## 3 Ways to Register

- [www.CULeaders.com](http://www.CULeaders.com)
- CALL 866-620-5937
- [registrar@CULeaders.com](mailto:registrar@CULeaders.com)



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

### Cancellations and Substitutions:

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.

**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

**\$200**

REGISTER BY  
MAY 1, 2022

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

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choose from dozens of  
terrific sessions.



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- 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 **\$200 PER PERSON**  
WHEN YOU SEND **7+ ATTENDEES**

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