



LEADERSHIP CONVENTION

JULY 19-22, 2022 CAESARS PALACE

Las Vegas

DISCOVER.
EXPERIENCE.
GROW.

BAR
RESCUE



Keynote Speaker **Jon Taffer**

Don't miss Las Vegas' legendary duo,
Penn & Teller!



WEDNESDAY, JULY 20, 2022

7:30PM - 8:30PM



Your total retirement solution

Financial insights

2021 will be known as the start of "The Great Resignation". Many companies today are facing a mass exodus of employees, both new and old. While companies are sorting through the why, we are beginning to see the true financial impacts.

How many of you are changing branch hours because you can't meet your staffing needs? How many of us are worried about losing middle managers because of increasing demands on workloads? All of these things trickle down to how well you are able to serve your members and meet their needs. The impact is real.



To learn more, [call 800.356.2644](tel:800.356.2644).

CunaMutualGroup™

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Dear Valued Convention Attendee,

Welcome to the 45th CU Leadership Convention – the nation's #1 Event for forward-thinking credit union leaders!



After 2 years of virtual events, we are so excited to be back in-person where we can share ideas, network and come together to discover innovative solutions and practical guidance not available anywhere else.

This year's event is **BIGGER, BETTER & BOLDER** than ever featuring...

- 4 ALL-NEW preconference workshops covering Big Data, financial management, strategic planning and supervisory committee best practices.
- World-class keynote speakers including Bar Rescue's Jon Taffer ... Master Storyteller Matthew Luhn ... and DEI Leader Wema Hoover.
- The legendary magicians Penn & Teller!
- 50+ CU expert speakers ready and willing to share their solutions to your toughest challenges.
- 7 NEW Breakout Summits packed with practical guidance to help your CU grow.
- Expanded exhibit hall and networking breaks to meet with vendors and colleagues.
- And much more that we will be unveiling throughout the convention.

We sincerely hope that you find this year's convention to be the most rewarding event you have ever attended!

Dennis J. Sullivan

Dennis J. Sullivan
Conference Chairman



LEADERSHIP
CONVENTION
JULY 19-22, 2022 CAESARS PALACE

DISCOVER.
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GROW.

Las Vegas



Connect with Abrigo at the 2022 CU Leadership Convention



Visit the Abrigo **booth 313**
to win 1 of 3 \$200 Amazon
Gift Card giveaways.



DAVE KOCH
Abrigo

You will not want to miss our session —
**Managing Loan Pricing in Changing
Rates — How to stay abreast as
markets adjust** from Abrigo's very
own Dave Koch.

Thursday, July 21
10:15–11:00^{AM} PST

Abrigo enables more than 2,300 U.S. financial institutions
to support their communities through
technology and advisory services that grow loans
and deposits and optimize risk.

Ready to get started?

Visit www.abrigo.com/CU-Leadership-Convention

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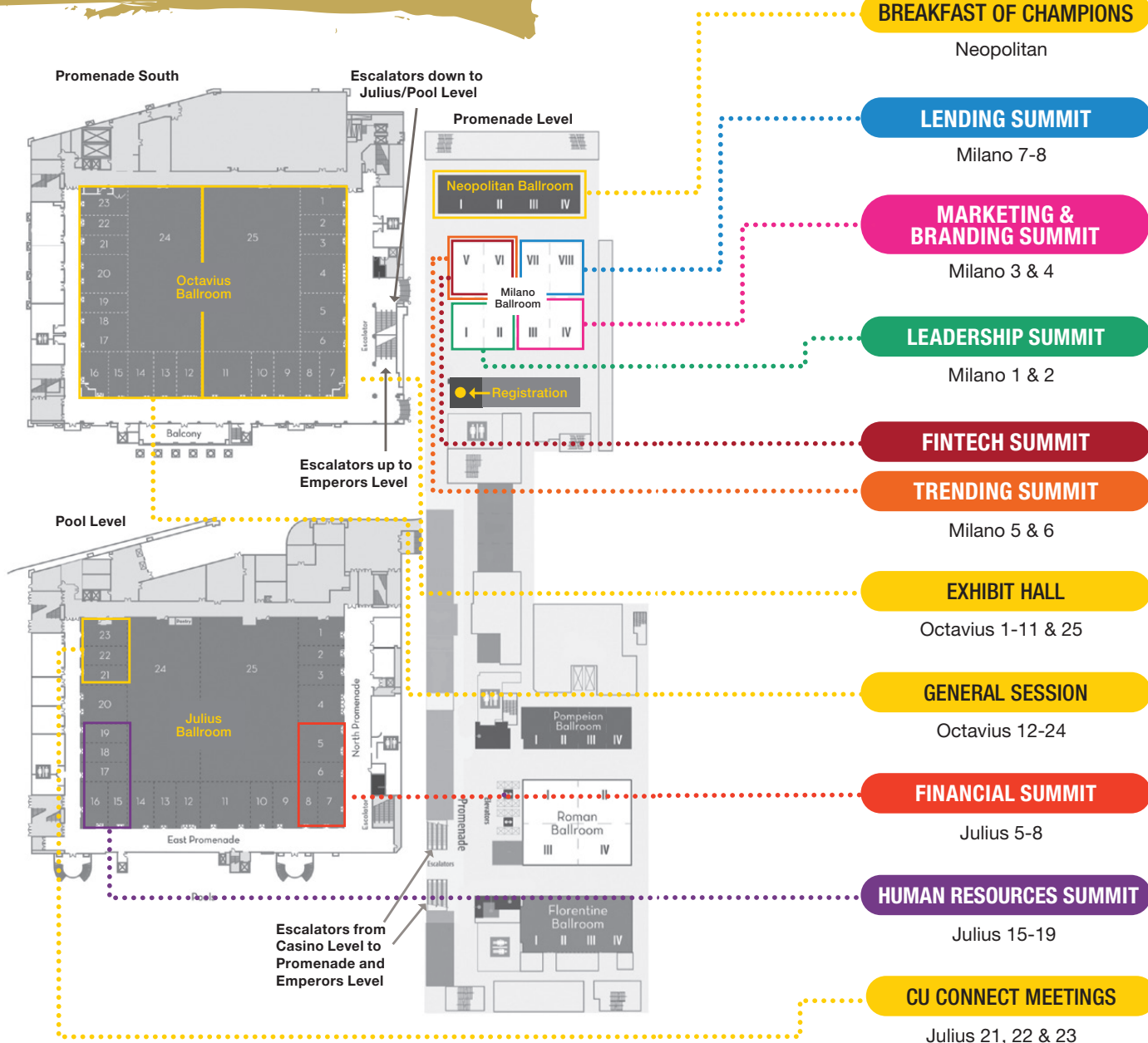
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NETWORK: SSID- CREDITUNIONLEADS
PASSWORD: CULC2022

Caesars Palace Map



Caesars Palace Map

Pre-Conference Workshops

HOT TOPIC #1
LEVERAGING BIG DATA TO CREATE VALUE

Milano I

HOT TOPIC #2
DECIPHER YOUR CU'S FINANCIAL STATEMENTS

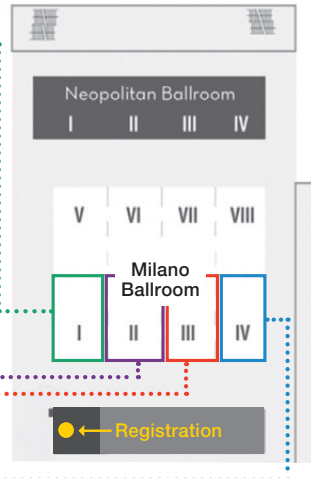
Milano II

HOT TOPIC #3
A NEW MODEL FOR STRATEGIC PLANNING

Milano III

HOT TOPIC #4
SUPERVISORY COMMITTEE DEEP DIVE

Milano IV



Guest Experience Packages

Thursday, July 21, 2022



- One admittance to either the Lip-Smacking Foodie Tour 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 LIP-SMACKING FOODIE TOUR

Discover a curated selection of locals' favorite culinary destinations in the newly revitalized downtown of Las Vegas. Join us for this special guest experience and savor a taste of truly authentic and independent establishments with chef-driven, seasonally focused farm-to-table fare. Guests receive VIP treatment and a variety of signature dishes as we tour 3-4 of top award-winning restaurants.

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.

CASINO GAMING AGENDA:

After the conference luncheon, meet one of our staff members in front of the registration desk located on the Promenade Level of the convention meeting space at 1:15 pm. Gaming is from 1:30 to 3:30 pm. Dessert and coffee will be served.

FOODIE TOUR AGENDA:

Meet one of our staff members in front of the registration desk located on the Promenade Level of the convention meeting space at 12:00 pm. Tour is from 12:30 to 3:30pm. You will be picked up and dropped off from Caesar's.

FOODIE TOUR AND CASINO GAMING EXPERIENCE ARE LIMITED TO PAID GUESTS.



LEADERSHIP
CONVENTION
JULY 25-28, 2023 CAESARS PALACE

DISCOVER
EXPERIENCE.
GROW.

Las Vegas

PRE-REGISTER & SAVE FOR 2023!

Reservations due by Friday, July 22, at 11:30 am.
(Only available to this year's attendees.)



LEADERSHIP CONVENTION

JULY 19-22, 2022 CAESARS PALACE

Las Vegas

DISCOVER.
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SPONSORS



TUESDAY,
JULY 19, 2022

Pre-Conference Workshops

10:00am – 5:00pm

Registration PROMENADE LEVEL

1:00pm – 4:00pm

Pre-Conference Workshops

HOT TOPIC #1

Leveraging big data to create value for you & your members MILANO I

ANNE LEGG, FOUNDER, THRIVE STRATEGIC SERVICES

HOT TOPIC #2

Do it like a pro: How to decipher your CU's financial statements in 2-1/2 minutes MILANO II

TIM HARRINGTON, TEAM RESOURCES

HOT TOPIC #3

A new model for strategic planning through a futurist lens MILANO III

TRICIA SZURGOT, SECURITYPLUS FEDERAL CU

HOT TOPIC #4

Supervisory committee deep dive: Planning, execution, and evaluation MILANO IV

ANCIN COOLEY, FOUNDER & PRINCIPAL OF SYNERGY CREDIT UNION CONSULTING, INC.

WEDNESDAY,
JULY 20, 2022

Day 1

7:00am – 5:00pm

Registration PROMENADE LEVEL

7:00am – 8:45am

Exhibit Hall Open OCTAVIUS

9:00am – 9:45am

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

JON TAFFER, CELEBRITY CHEF FROM BAR RESCUE

9:45am – 10:30am

Leadership panel discussion: Top CEOs discuss today's most pressing CU challenges & opportunities OCTAVIUS

TRICIA SZURGOT, SECURITYPLUS FEDERAL CU;
JEREMY GARZA, GULF COAST FCU

10:30am – 11:00am

Networking Break in Exhibit Hall OCTAVIUS

11:00am – 12:00pm	General Session: 6x6 – 6 speakers sharing their best ideas OCTAVIUS ANNE LEGG, THRIVE, STRATEGIC SERVICES TIM HARRINGTON, TEAM RESOURCES RONALDO HARDY, CU STRATEGIC PLANNING BOB LOCKETT, WORKERS CREDIT UNION DREW DIZON, NYMUS BRUCE BAUER, SR., CUNA MUTUAL GROUP
12:00pm – 12:45pm	Lunch JULIUS
12:45pm – 1:15pm	Networking/Dessert in Exhibit Hall OCTAVIUS
1:15pm – 1:40pm	Breakout Summits Begin
LEADERSHIP SUMMIT	The deposit dilemma: What to do MILANO 1 & 2 DANIELLE SCODELLARO, CUNA MUTUAL GROUP; BRUCE BAUER, SR., CUNA MUTUAL GROUP
MARKETING & BRANDING SUMMIT	Niche marketing made simple: 3 steps to generate 20% YoY growth in any channel (Session repeats at 1:50pm) MILANO 3 & 4 JAMES ROBERT LAY, DIGITAL GROWTH INSTITUTE
FINTECH SUMMIT	Close encounters of the Fintech kind: Research, trends & live demos of the newest financial apps MILANO 5 & 6 DAVE DEFAZIO, STRATEGYCORPS
LENDING SUMMIT	How to navigate and maximize today's auto lending landscape MILANO 7 & 8 MATT ROE, OPEN LENDING
HR SUMMIT	Win the battle for talent: How culture can be your most powerful weapon for good (Session repeats at 1:50pm) JULIUS 15-19 ROBERT "BOB" LOCKETT, WORKERS CU
FINANCIAL SUMMIT	Bill Hampel's economic outlook for 2022 & beyond JULIUS 5-8 BILL HAMPELL, ECONOMIST
1:40pm – 1:50pm	Transitional Break
1:50pm – 2:20pm	Breakout Summits Resume
LEADERSHIP SUMMIT	Leading an organization that matters MILANO 1 & 2 TIM HARRINGTON, CPA, TEAM RESOURCES

MARKETING & BRANDING SUMMIT

Niche marketing made simple: 3 steps to generate 20% YoY growth in any channel
 (Session repeated from 1:15pm) MILANO 3 & 4

JAMES ROBERT LAY, DIGITAL GROWTH INSTITUTE

FINTECH SUMMIT

Embracing Fintech collaboration: Leveling the playing field for CUs MILANO 5 & 6

BRIAN SCOTT, PSCU

LENDING SUMMIT

The robots are coming! Machine learning/ AI in consumer lending (Session is repeated Thursday at 2:30pm) MILANO 7 & 8

DON ARKELL, CU LENDING ADVICE, LLC

HR SUMMIT

Win the battle for talent: How culture can be your most powerful weapon for good
 (Session repeated from 1:15pm) JULIUS 15-19

ROBERT "BOB" LOCKETT, WORKERS CU

FINANCIAL SUMMIT

Digital Tools to Increase Your Loan Portfolio 24/7 Without Impacting Your Operation Costs JULIUS 5-8

DON SHAFFER, QUILO SOLUTIONS

2:20pm – 2:30pm

Transitional Break

2:30pm – 2:55pm

Breakout Summits Resume

LEADERSHIP SUMMIT

7 rules highly profitable credit unions use to measure DEI MILANO 1 & 2

RONALDO HARDY, CU STRATEGIC PLANNING

MARKETING & BRANDING SUMMIT

Big three MX strategies for better results for your CU & your members MILANO 3 & 4

DAVID DEAN, CU SOLUTIONS GROUP

FINTECH SUMMIT

A brand-new world of Fintech, investment and digital innovation MILANO 5 & 6

NICK EVENS, CURQL COLLECTIVE, LLC

LENDING SUMMIT

Keys to growing your loan portfolio organically MILANO 7 & 8

ANCIN COOLEY, SYNERGY CREDIT UNION CONSULTING

HR SUMMIT

Workplace cohesion: The key for CU leaders to close the door on the Great Resignation JULIUS 15-19

TROY HALL, PH.D. TALENT RETENTION CONSULTANT

FINANCIAL SUMMIT

Managing risk in a rising rate environment

JULIUS 5-8

JIM CRAVEN, MCQUEEN FINANCIAL ADVISORS, INC.

2:55pm – 4:00pm

Happy Hour in Exhibit Hall OCTAVIUS

7:30pm – 8:30pm

Las Vegas' legendary duo,
Penn & Teller! (Must have
convention badge to enter)
OCTAVIUS



THURSDAY,
JULY 21, 2022

Day 2

7:30am – 8:45am

Breakfast of Champions NEOPOLITAN
(Available only to those who RSVP'd)

7:30am – 9:00am

Exhibit Hall Open OCTAVIUS

9:00am – 9:45am

Storytelling for Business: Lessons CU
leaders can learn from a top Hollywood
animator OCTAVIUS

MATTHEW LUHN, FORMER PIXAR ANIMATOR

9:45am – 10:00am

2-Minute Spotlight OCTAVIUS

PATRICK ADAMS, ST. LOUIS COMMUNITY CU
BRANDI STANKOVIC, CU SOLUTIONS GROUP
ANCIN COOLEY, SYNERGY CU CONSULTING
EMILY HOLLIS, ALM FIRST
JAMES ROBERT LAY, DIGITAL GROWTH INSTITUTE

10:00am – 10:15am

Transitional Break

10:15am – 11:00am

Breakout Summits Resume

LEADERSHIP SUMMIT

Enduring brands: How CUs are “living the
mission” & winning hearts and minds
MILANO 1 & 2

SUSAN MITCHELL, STANKOVIC & ASSOCIATES

MARKETING &
BRANDING SUMMIT

How Credit Unions thrive by thinking
like brands MILANO 3 & 4

JOHN JANCLAES, NYMBUS CUSO;
APRIL CLOBES, MICHIGAN STATE UNIVERSITY FCU

TRENDING SUMMIT

Big changes affecting strategy, structure,
governance and leadership MILANO 5 & 6

TOM GLATT, JR., GLATT CONSULTING GROUP, INC.

LENDING SUMMIT

Managing loan pricing in changing rates:
How to stay abreast, and profitable as
markets adjust MILANO 7 & 8

DAVE KOCH, ABRIGO

HR SUMMIT

Preparing credit unions for the future
of work JULIUS 15-19

LYNN HECKLER, PSCU

FINANCIAL SUMMIT

Ensuring a successful M&A deal
JULIUS 5-8

LARRY SPACCASI & JEFF CARDONE, LUSE GORMAN

CU Connect Meeting: How to be the Amazon
Prime of Checking (invitation only) JULIUS 21

DAVE DEFAZIO, STRATEGY CORPS

11:00am – 11:45am

Networking Break in Exhibit Hall
OCTAVIUS

11:45am – 12:30pm

Breakout Summits Resume

LEADERSHIP SUMMIT

The Big 3 skills needed for the CU
executive of the future MILANO 1 & 2

JOHN JANCLAES, NYMBUS CUSO

MARKETING &
BRANDING SUMMIT

Transforming a brand: How to break
through barriers, create real change &
align for the future MILANO 3 & 4

TRICIA SZURGOT, SECURITYPLUS FEDERAL CU

TRENDING SUMMIT

Roundtable with Tom Glatt MILANO 5 & 6

TOM GLATT, JR., GLATT CONSULTING GROUP, INC.

LENDING SUMMIT

Roundtable with Matt Roe MILANO 7 & 8

MATT ROE, OPEN LENDING

HR SUMMIT

Roundtable with Dr. Troy Hall JULIUS 15-19

TROY HALL, PH.D., AUTHOR, TALENT RETENTION CON

FINANCIAL SUMMIT

Top performing credit unions: Who are they
and what they do differently JULIUS 5-8

PETER DUFFY, PIPER SANDLER

11:45am – 12:30pm

CU Connect Meeting: Taking your Business
Services to the Next Level (invitation only)
JULIUS 22

MIKE SMITH, CU BUSINESS GROUP

11:45am – 12:30pm	CU Connect Meeting: How the Recession is Affecting Executive Retention & Executive Benefits (invitation only) JULIUS 23 MARIA KELL & ROBERT FLOWERS, BCC
12:00pm – 3:30pm	Lip Smacking Foodie Tour Begins (See page 9 for details) REGISTRATION DESK
12:30pm – 1:15pm	Networking Lunch JULIUS
1:15pm – 1:45pm	Networking/Dessert Exhibit Hall OCTAVIUS
1:15pm – 3:30pm	Casino Gaming Made Fun & Easy Begins (See page 9 for details) REGISTRATION DESK
1:45pm – 3:00pm	Storytelling for Business Workshop with Hollywood Animator Matthew Luhn (Separate registration required) JULIUS 1 - 4 MATTHEW LUHN, FORMER PIXAR ANIMATOR
1:45pm – 2:15pm	Breakout Summits Resume
LEADERSHIP SUMMIT	Future-proof your board: How CU Leaders must adapt in the new normal MILANO 1 & 2 BRANDI STANKOVIC, CU SOLUTIONS GROUP
MARKETING & BRANDING SUMMIT	Values-based branding: The secret to creating enduring & authentic relationships with members MILANO 3 & 4 AMANDA THOMAS, TWOSCORE, LLC
TRENDING SUMMIT	Top three emerging risks every executive needs to know MILANO 5 & 6 ERIN O'HERN, VICLARITY
LENDING SUMMIT	How predictive analytics can help financial institutions manage risk MILANO 7 & 8 MATTHEW COURT, NCINO
HR SUMMIT	DEI lessons learned and practical strategies to support cultural change JULIUS 15-19 TONITA WEBB, VERITY CREDIT UNION
FINANCIAL SUMMIT	Top 4 financial strategies every CU must consider in a post-COVID economy (Session repeats at 2:30pm) JULIUS 5-8 EMILY HOLLIS, ALM FIRST

2:15pm – 2:30pm **Transitional Break**
2:30pm – 3:00pm **Breakout Summits Resume**

LEADERSHIP SUMMIT

Big data & the ONE thing you can do that will matter most MILANO 1 & 2

ANNE LEGG, THRIVE STRATEGIC SERVICES

MARKETING & BRANDING SUMMIT

Strategies to re-position your marketing for the fastest growing segments MILANO 3 & 4

VICTOR MIGUEL CORRO, COOPERA CONSULTING

TRENDING SUMMIT

Cryptocurrency and the new world of digital assets for CUs MILANO 5 & 6

GREG GLAWSON, CIO, UNIFY FCU

LENDING SUMMIT

The robots are coming! Machine learning/ AI in consumer lending (Session is repeated from Wednesday 1:50pm) MILANO 7 & 8

DON ARKELL, CU LENDING ADVICE, LLC

HR SUMMIT

Where do we go from here? Practical answers to create a commitment to change for all JULIUS 15-19

RENEE SATTIEWHITE, AACUC

FINANCIAL SUMMIT

Top 4 financial strategies every CU must consider in a post-COVID economy (Session repeated from 1:45pm) JULIUS 5-8

EMILY HOLLIS, ALM FIRST

FRIDAY,
JULY 22, 2022

Day 3

7:30am – 9:00am	Buffet Breakfast OCTAVIUS
9:00am – 10:00am	General Session – Reframing diversity, equity & inclusion: How difference can make a difference OCTAVIUS 12-24 WEMA HOOVER, GLOBAL DIVERSITY LEADER
10:00am – 11:00am	Jeopardy! It's not just a game show OCTAVIUS 12-24 PATRICK ADAMS, ST. LOUIS COMMUNITY CU
11:00am	Conference Adjourns

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Pre-Conference Workshops

TUESDAY | JULY 19, 2022

1:00pm – 4:00pm

MILANO I— IV

Pre-Conference Workshops

HOT TOPIC #1

MILANO I



Leveraging big data to create value for you & your members

ANNE LEGG, FOUNDER, THRIVE STRATEGIC SERVICES

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.

NOT REGISTERED? ADD A DEEP DIVE WORKSHOP
AT THE REGISTRATION DESK.



Do it like a pro: How to decipher your CU's financial statements in 2-1/2 minutes

**TIM HARRINGTON, CPA, PRESIDENT,
TEAM RESOURCES**

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!



A new model for strategic planning through a futurist lens

**TRICIA SZURGOT, PRESIDENT/CEO,
SECURITYPLUS FEDERAL CU**

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.



Supervisory committee deep dive: Planning, execution, and evaluation

ANCIN COOLEY, FOUNDER & PRINCIPAL OF SYNERGY CREDIT UNION CONSULTING, INC.

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 to plan that you can use to 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.

Day 1

WEDNESDAY | JULY 20, 2022

7:00am – 5:00pm

PROMENADE LEVEL

Registration

7:00am – 8:45am

OCTAVIUS

Exhibit Hall Open

9:00am – 9:45am

OCTAVIUS



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

JON TAFFER, CELEBRITY CHEF FROM BAR RESCUE

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.

9:45am – 10:30am

OCTAVIUS



Leadership panel discussion: Top CEOs discuss today's most pressing CU challenges & opportunities

TRICIA SZURGOT, PRESIDENT/CEO,
SECURITYPLUS FEDERAL CU; **JEREMY GARZA**,
PRESIDENT/CEO, GULF COAST FCU



Organizations today are dealing with
unprecedented changes. In just the
last 2 years, we have experienced
the worst pandemic in more than a

century, social changes not seen since the 1960s, inflation
levels at a 40-year high and an economy that is far from stable.
Discover how some of the country's most innovative credit
union leaders are navigating these historical challenges and
uncovering new opportunities in this lively panel discussion.

10:30am – 11:00am

OCTAVIUS

Networking Break in Exhibit Hall

11:00am – 12:00pm

OCTAVIUS

General Session: 6x6 – 6 speakers sharing their best ideas

Anne Legg, Founder, THRIVE, Strategic Services; **Tim Harrington**, CPA, President, TEAM Resources; **Ronaldo Hardy**, Chief Diversity and Inclusion Officer, CU Strategic Planning; **Bob Lockett**, Strategy, Operations & Financial Executive, Workers Credit Union; **Drew Dizon**, EVP, Strategic Solutions, NYMUS; **Bruce Bauer, Sr.** Executive Benefits Specialist, CUNA Mutual Group

12:00pm – 12:45pm

JULIUS

Lunch

12:45pm – 1:15pm

OCTAVIUS

Networking/Dessert in Exhibit Hall

1:15pm – 1:40pm

Breakout Summits Begin

LEADERSHIP SUMMIT

MILANO 1 & 2



The deposit dilemma: What to do

DANIELLE SCODELLARO, EXECUTIVE
BENEFITS SPECIALIST, CUNA MUTUAL GROUP;
BRUCE BAUER, SR. EXECUTIVE BENEFITS
SPECIALIST, CUNA MUTUAL GROUP



It's important to understand
Alternative Funding Options for
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.

Sponsored by:



MARKETING & BRANDING SUMMIT

MILANO 3 & 4



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

JAMES ROBERT LAY, CEO, DIGITAL GROWTH
INSTITUTE AND AUTHOR OF THE BEST-SELLER,
BANKING ON DIGITAL GROWTH

Segmenting markets and product offerings sound like great ideas in meetings, but few actually move forward. Why? “Too much work ... won’t make a difference ... new channels are required.” Perhaps you’ve heard these complaints or even mumbled them yourself! Yet, studies consistently show niche marketing is far more profitable and generates higher conversion rates. 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*.

Note: Session is repeated at 1:50pm.

FINTECH SUMMIT

MILANO 5 & 6



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

DAVE DEFAZIO, PARTNER, STRATEGYCORPS

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.

SPONSORED BY **strategycorps** ➤

LENDING SUMMIT

MILANO 7 & 8



How to navigate and maximize today’s auto lending landscape

MATT ROE, CHIEF REVENUE OFFICER,
OPEN LENDING

With increased competition and car values at all-time highs, learn how to utilize automation and pricing strategies to put your financial intuition in a position to grow your auto portfolio while effectively managing risk, and achieving yields 3 to 4 times greater than your prime portfolio.

SPONSORED BY: **OpenLending**
Say YES to more automotive loans.

HUMAN RESOURCES SUMMIT

JULIUS 15-19



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

ROBERT “BOB” LOCKETT, CSO & SVP
DIVERSIFIED SERVICES, WORKERS CU

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.

Note: Session repeats at 1:50 pm.

FINANCIAL SUMMIT

JULIUS 5 - 8



Bill Hampel's economic outlook for 2022 & beyond

BILL HAMPELL, ECONOMIST

One of the credit union movement's most respected economists, Bill

Hampel, returns to share his expert analysis of the economy for the next 18 months. 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.

1:40pm – 1:50pm

Transitional Break

1:50pm – 2:20pm

Breakout Summits Resume

LEADERSHIP SUMMIT

MILANO 1 & 2



Leading an organization that matters

TIM HARRINGTON, CPA,
PRESIDENT, TEAM RESOURCES

Purpose makes a difference.

Business 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. Why? Employees are more engaged, members are more loyal and organizational leaders are more inspired. Recent studies show organizations with a purpose-driven culture generate return to shareholders that are 10 to 12 percent greater than their competitors. Find out what purpose driven businesses, and especially purpose driven credit unions, are using to create an organization that delivers amazing financial results and that positively impact the lives of those they serve.

MARKETING & BRANDING SUMMIT

MILANO 3 & 4



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

JAMES ROBERT LAY, CEO, DIGITAL GROWTH
INSTITUTE AND AUTHOR

Segmenting markets and product offerings sound like great ideas in meetings, but few actually move forward. Why? "Too much work ... won't make a difference ... new channels are required." Perhaps you've heard these complaints or even mumbled them yourself! Yet, studies consistently show niche marketing is far more profitable and generates higher conversion rates. 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*.

Note: Session is repeated from 1:15pm.

FINTECH SUMMIT

MILANO 5 & 6



Embracing Fintech collaboration: Leveling the playing field for CUs

BRIAN SCOTT, CHIEF GROWTH OFFICER, PSCU

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.

SPONSORED BY



LENDING SUMMIT

MILANO 7 & 8



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

DON ARKELL, OWNER, CU LENDING ADVICE, LLC

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

Note: Session is repeated Thursday at 2:30 pm.

HUMAN RESOURCES SUMMIT

JULIUS 15-19



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

ROBERT "BOB" LOCKETT, CSO & SVP, DIVERSIFIED SERVICES, WORKERS CU

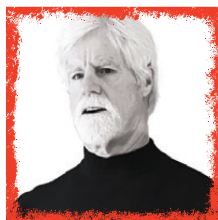
What if your culture became your competitive advantage for retaining employees? What if potential employees considered your CU to be their preferred employer? Find out how one of the country's oldest CUs recently overhauled its corporate culture to create the "Workers Way" – a member-centric approach

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.

Note: Session is repeated from 1:15pm.

FINANCIAL SUMMIT

JULIUS 5 - 8



Digital tools to increase your loan portfolio 24/7 without impacting your operation costs

DON SHAFER, CO-FOUNDER & CHIEF EVANGELIST, QUILO SOLUTIONS

Go Digital or Go Home! Launching a digital loan officer that works 24/7, 365 days a year to help meet your members needs for personal loans is the first step toward digital transformation. Did you know 75% of personal loan applications are submitted after 5pm and on weekends?

In this session, learn how your colleagues are digitally transforming their credit unions by successfully implementing Digital Loan Officers that work 24/7, that underwrite, approve, instantly fund and service personal loans for their members who want to pay down credit card debt, replenish their checking accounts or make new purchases. You will also learn how your credit union can onboard thousands of new loans and new members by providing POS financing to the customers of SMBs in your market without any impact on current operations!

SPONSORED BY: **Quilo™**

2:20pm – 2:30pm

Transitional Break

2:30pm – 2:55pm

Breakout Summits Resume

LEADERSHIP SUMMIT

MILANO 1 & 2



7 rules highly profitable credit unions use to measure DEI

RONALDO HARDY, CHIEF DIVERSITY AND INCLUSION OFFICER, CU STRATEGIC PLANNING

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.

MARKETING & BRANDING SUMMIT

MILANO 3 & 4



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

DAVID DEAN, COO, MARKETING SOLUTIONS AT CU SOLUTIONS GROUP

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.

FINTECH SUMMIT

MILANO 5 & 6



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

NICK EVENS, PRESIDENT & CEO, CURQL COLLECTIVE, LLC

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.

LENDING SUMMIT

MILANO 7 & 8



Keys to growing your loan portfolio organically

ANCIN COOLEY, PRINCIPAL, SYNERGY CREDIT UNION CONSULTING

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.

HUMAN RESOURCES SUMMIT

JULIUS 15-19



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

TROY HALL, PH.D., AUTHOR AND TALENT RETENTION CONSULTANT

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.



Managing risk in a rising rate environment

JIM CRAVEN, VP & SENIOR CONSULTANT,
MCQUEEN FINANCIAL ADVISORS, INC.

Everywhere we look there are signs of uncertainty and potential recession. Interest rates have already started trending higher and will likely continue to rise throughout 2022. This is the opposite of what typically happens when economic conditions deteriorate. Our industry continues to focus on economic uncertainty, inflation and the impact on credit union health. Participants will gain a broader understanding of economic conditions, inflation expectations, interest rate trends and income preservation action steps.

SPONSORED BY: **McQueen**
Financial Advisors

2:55pm – 4:00pm

OCTAVIUS

Happy Hour in Exhibit Hall

7:30pm – 8:30pm

OCTAVIUS



Las Vegas' legendary duo, Penn & Teller!

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.

This is an exclusive benefit available ONLY to convention or guest registrants. Attendees must have their delegate or guest badges to gain entry to the show.

Day 2

THURSDAY | JULY 21, 2022

7:30am – 8:45am

NEOPOLITAN

Breakfast of Champions

Note: All participants must have RSVP'd in advance to access this idea-exchange.

7:30am – 9:00am

OCTAVIUS

Exhibit Hall Open

9:00am – 9:45am

OCTAVIUS



Storytelling for Business: Lessons CU leaders can learn from a top Hollywood animator

MATTHEW LUHN, FORMER PIXAR 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.

9:45am – 10:00am

OCTAVIUS

2-Minute Spotlight

PATRICK ADAMS, ST. LOUIS COMMUNITY CU; **BRANDI STANKOVIC**, COO/ CHIEF STRATEGY OFFICER, CU SOLUTIONS GROUP & HOST OF THE PODCAST, THE STRATEGIC HOTBOX; **ANCIN COOLEY**, FOUNDER/PRINCIPAL, SYNERGY CREDIT UNION CONSULTING; **EMILY HOLLIS**, CEO, ALM FIRST; **JAMES ROBERT LAY**, FOUNDER & CEO, DIGITAL GROWTH INSTITUTE

10:00am – 10:15am

Transitional Break

10:15am – 11:00am

Breakout Summits Resume

LEADERSHIP SUMMIT

MILANO 1 & 2



Enduring brands: How CUs are “living the mission” & winning hearts and minds

SUSAN MITCHELL, CEO, MITCHELL, STANKOVIC & ASSOCIATES, HERB WEGNER OUTSTANDING LIFETIME ACHIEVEMENT AWARD WINNER

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.

MARKETING & BRANDING SUMMIT

MILANO 3 & 4



How Credit Unions thrive by thinking like brands

JOHN JANCLAES, PRESIDENT, NYMBUS CUSO; **APRIL CLOBES**, PRESIDENT & CEO, MICHIGAN STATE UNIVERSITY FCU



Join us as John Janclaes President, Nymbus CUSO and former CEO, Partners FCU sits down with April Clobes President and Chief Executive Officer of Michigan State University Federal Credit Union to discuss how MSUFCU is charting a path to new revenue growth by building bespoke digital brands.

During this session you will learn how to:

- Focus your branding internally and externally to generate the most impact
- Identify the “riches in niches” within your member segments to deliver your higher ROI
- Leverage the same metrics MSU FCU uses to measure its brand value, marketing campaigns and member satisfaction
- And much more.

SPONSORED BY:  NYMBUS®

TRENDING SUMMIT

MILANO 5 & 6



Big changes affecting strategy, structure, governance and leadership

TOM GLATT, JR., PRINCIPAL/STRATEGY CONSULTANT, GLATT CONSULTING GROUP, INC.

Credit unions are bound by their strategy, structure,

governance, and leadership decisions, but should past decisions concerning these critical areas be relied on in the years ahead? Perhaps, but some decisions and resulting operating methodologies will likely not align with the four most important, emerging trends affecting credit unions: environmentally-derived strategy ... strategy-infused organizational structure ... principles-based governance ... and character-driven leadership. In this session, Tom Glatt, Jr. will dive deep into each of these four trends, showcasing how they will greatly reshape credit unions and help your leadership team prepare for the future ahead.

LENDING SUMMIT

MILANO 7 & 8



Managing loan pricing in changing rates: How to stay abreast, and profitable as markets adjust

DAVE KOCH, DIRECTOR, ADVISORY SERVICES, ABRIGO

Market rate movements are inevitable! But institutional loan rates are not as elastic. Is your lending team is originating both high quality and profitable loans? In times of changing rates, history has proven that there is a lag in your loan offer and that often rates move by less than the market movements. This gap comes from a pricing process that is both reactive and lacks the right metrics for measuring well-priced loans. During this session we will outline the best practices for determining profitability in loan pricing and present a concrete decision-making process to help ensure a more proactive and profitable margin under changing market rates.

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make big things happen.

HUMAN RESOURCES SUMMIT

JULIUS 15-19



Preparing credit unions for the future of work

LYNN HECKLER, CHIEF TALENT OFFICER, PSCU

The global pandemic and talent shortage created an unprecedented need for organizations to proactively address the future of work. While many organizations consider attracting and retaining talent as one of their top enterprise risks, others struggle to design a comprehensive strategy to ensure their ability to compete for talent in the future. Employers need to build an infrastructure that supports the future of work now, identifying and developing the types of workers that will be needed in the years to come. In this session, Lynn Heckler, Chief Talent Officer at PSCU, will cover the macro trends impacting the workforce and explore strategies to prepare credit unions for the future of work.

SPONSORED BY:



FINANCIAL SUMMIT

JULIUS 5 - 8



Ensuring a successful M&A deal

LARRY SPACCASI, JD, PARTNER, LUSE GORMAN, PC; **JEFF CARDONE**, JD, PARTNER LUSE GORMAN, PC



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.

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11:00am – 11:45am

OCTAVIUS

Networking Break in Exhibit Hall

11:45am – 12:30pm

Breakout Summits Resume

LEADERSHIP SUMMIT

MILANO 1 & 2



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

JOHN JANCLAES, PRESIDENT, NYMBUS CUSO

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.

SPONSORED BY



MARKETING & BRANDING SUMMIT

MILANO 3 & 4



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

TRICIA SZURGOT, CEO, SECURITYPLUS FEDERAL CU

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.

TRENDING SUMMIT

MILANO 5 & 6



Roundtable with Tom Glatt

TOM GLATT, JR., PRINCIPAL/STRATEGY CONSULTANT, GLATT CONSULTING GROUP, INC.

Join Tom Glatt, Jr. in this interactive, idea-sharing session as we explore the Big 4 changes affecting credit unions today. We will discuss how other credit unions are managing their strategy, structure, governance and leadership decisions. Hear how other CU leaders are already employing some of these innovative ideas and how you can apply them in your credit union moving forward.

LENDING SUMMIT

MILANO 7 & 8



Roundtable with Matt Roe

MATT ROE, CHIEF REVENUE OFFICER,
OPEN LENDING

Find out what's working and what's not as we discuss some of the biggest challenges and opportunities

for credit union lending today in an open idea-exchange. Facilitated by Open Lending's Matt Roe, this is a unique chance to learn how other credit unions are managing their loan portfolio in a rising rate environment, how cutting-edge credit unions are competing in the digital marketplace and how others are uncovering new and emerging lending opportunities.

HUMAN RESOURCES SUMMIT

JULIUS 15-19



Roundtable with Dr. Troy Hall

TROY HALL, PH.D., AUTHOR AND TALENT
RETENTION CONSULTANT, AND FORMER CHIEF
STRATEGY OFFICER AT SOUTH CAROLINA, FCU

Dr. Troy Hall dives deep into some of the biggest challenges facing

credit unions today. Meet with other credit union leaders and hear from your colleagues first-hand in this interactive session as we discuss the core values that are important to credit unions, culture and how it can be used to recruit and retain your top talent, remote work and how to manage it effectively, and much more.

FINANCIAL SUMMIT

JULIUS 5 - 8



Top performing credit unions: Who are they and what they do differently

PETER DUFFY, MANAGING DIRECTOR,
PIPER SANDLER

What do top performers focus on and what is the "Three Legged Stool of CU Strategic Planning?" What does top performing look like and how should a C-suite and board evaluate the performance of top CUs versus their own? How did top performers "get there" and how will top performance be sustained over multiple years. The longest reaching historical perspective possible- will be used to show performance utilizing various sources including NCUA call report data.

The specific metrics to evaluate top performance will be shared and includes a practical discussion of why the metrics were chosen.

Actionable steps to maintain performance will be shared, including the strategic choices the board and C-suite should be considering to determine how to go forward given the impact of fintech and technology. At the highest level, a CU has 6 potential paths to take to remain vibrant, all will be shared.

12:30pm – 1:15pm

JULIUS

Luncheon

1:15pm – 1:45pm

OCTAVIUS

Networking/Dessert Exhibit Hall

1:45pm – 3:00pm

JULIUS 1 - 4



Storytelling for Business Workshop with Hollywood Animator Matthew Luhn

MATTHEW LUHN, FORMER PIXAR ANIMATOR

Note: This workshop requires

separate registration. 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.

1:45pm – 2:15pm

Breakout Summits Resume

LEADERSHIP SUMMIT

MILANO 1 & 2



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

BRANDI STANKOVIC, ED.D., COO / CHIEF STRATEGY OFFICER, CU SOLUTIONS GROUP

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. In 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?

MARKETING & BRANDING SUMMIT

MILANO 3 & 4



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

AMANDA THOMAS, FOUNDER & PRESIDENT, TWOSCORE, LLC

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.

TRENDING SUMMIT

MILANO 5 & 6



Top three emerging risks every executive needs to know

ERIN O'HERN, VP STRATEGIC INITIATIVES, VICLARITY

In this changing environment, adapting to developing trends is critical. Join a discussion on both long and short-term trends and areas of focus for executives to consider. With this targeted overview of the most important emerging risks; understand what techniques are used to manage an overall framework for governance risk and compliance systems, issues regulators are watching including learnings from recent enforcement actions and evolving financial inclusion considerations.

Emerging risks can be managed through preparation and knowledge. Senior leaders will walk away from this session with:

- An updated understanding of governance, risk and compliance frameworks that incorporate the strategic direction of the organization and the risk management activity it supports.
- What board members and CEOs need to know about recent regulatory enforcement actions, including fair lending and compliance challenges.
- The financial inclusion risk and compliance considerations that are overlooked in this developing DEI conversation.

LENDING SUMMIT

MILANO 7 & 8



How predictive analytics can help financial institutions manage risk

MATTHEW COURT, SVP, PORTFOLIO ANALYTICS, NCINO

In our current state, financial institutions (FIs) will face new risks during an uncertain and unpredictable economic recovery. Potential credit losses, delinquency trends, concentration risk, and credit migration trends will need to be closely monitored, which is best achieved through enhanced reporting efficiency, predictive insights, and stronger portfolio visibility. This gives FIs a clearer understanding of different segments within their portfolio and how they are changing so they can deliver the right insights to the right stakeholder at the right time.

Sponsored by



HUMAN RESOURCES SUMMIT

JULIUS 15-19



DEI lessons learned and practical strategies to support cultural change

TONITA WEBB, PRESIDENT & CEO, VERITY CREDIT UNION

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.

FINANCIAL SUMMIT

JULIUS 5 - 8



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

EMILY HOLLIS, OWNER, ALM FIRST

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.

Note: Session repeats at 2:30 pm.

2:15pm – 2:30pm

Transitional Break

2:30pm – 3:00pm

Breakout Summits Resume

LEADERSHIP SUMMIT

MILANO 1 & 2



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

ANNE LEGG, FOUNDER, THRIVE STRATEGIC SERVICES

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.

MARKETING & BRANDING SUMMIT

MILANO 3 & 4



Strategies to re-position your marketing for the fastest growing segments

VICTOR MIGUEL CORRO, CEO, COOPERA CONSULTING

While other credit unions may be merging or even acquiring banks to grow, Victor Miguel Corro says many credit unions are overlooking the fast-growing market segments within their own FOM. Using internal and external data mining, Corro says far too many CUs continue to serve legacy members while Latino, Hispanic, African-American, Asian and multi-racial segments grow at a record pace. Join Corro as he discusses how some of the country's leading CUs are tapping into their own analytics and increasing memberships 33.1% ... growing loans 44.2% ... boosting assets 31.0% ... and driving up assets 0.32% all without harming portfolio quality.

TRENDING SUMMIT

MILANO 5 & 6



Cryptocurrency and the new world of digital assets for CUs

GREG GLAWSON, CIO, UNIFY FCU

Cryptocurrency is quickly gaining the attention of investors, consumers and traders. It is now the 4th most popular type of investment. Bitcoin alone has a market cap that would rank in the Top 10 among companies in the S&P 500. Many CUs are wondering how and if to offer cryptocurrency or otherwise be left behind as the digital currency heats up. Find out why Unify FCU is leading the movement with cryptocurrency, how it can be used as collateral among members, the regs regarding bitcoin, how the new asset is expanding business with indirect members, and the outlook ahead in the volatile but growing digital currency.

LENDING SUMMIT

MILANO 7 & 8



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

DON ARKELL, OWNER, CU LENDING ADVICE, LLC

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

Note: Session repeated from Wednesday at 1:50pm

HUMAN RESOURCES SUMMIT

JULIUS 15-19



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

RENEE SATTIEWHITE, PRESIDENT & CEO, AFRICAN-AMERICAN CREDIT UNION COALITION

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.

FINANCIAL SUMMIT

JULIUS 5 - 8



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

EMILY HOLLIS, OWNER, ALM FIRST

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.

Note: Session repeated from 1:45pm

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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:

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- Charter conversion/expansion
- Subordinated debt issuances
- Executive compensation/employee benefits
- Corporate governance
- Regulatory, compliance and enforcement matters.

For more information, please visit our website or contact:

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Day 3

FRIDAY | JULY 22, 2022

7:30am – 9:00am

OCTAVIUS

Buffet Breakfast

9:00am – 10:00am

OCTAVIUS 12-24

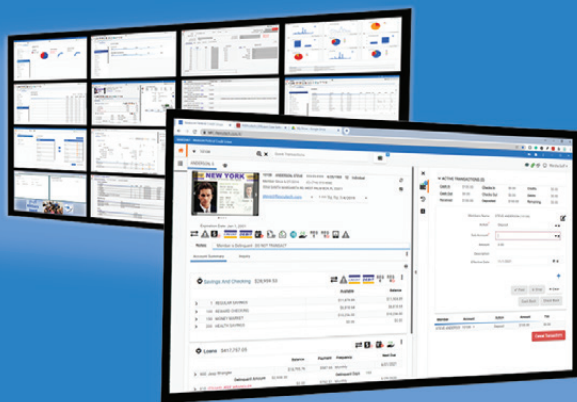


General Session – Reframing diversity, equity & inclusion: How difference can make a difference

WEMA HOOVER, GLOBAL DIVERSITY, EQUITY & INCLUSION LEADER, EXECUTIVE COACH, CULTURE CURATOR

As a former Chief Diversity Officer, Cultural Strategist and Employee Engagement Leader at Fortune 500 companies including Google, Pfizer, Sanofi, and Bristol-Myers Squibb, Wema Hoover demonstrates how to harness diversity to unlock an organization’s skills and abilities. She reveals how inclusive practices lead to increased employee engagement and collaboration, breakthrough thinking and enhanced innovation. Wema also discusses unconscious bias, how to create a culture of belonging, and cultural competence. An authentic, riveting and impactful speaker, Wema uses her lived experiences as a Black female senior executive to show the true potential of diversity and that differences really can make a difference.

The Next Generation CORE



FLEX

www.flexcotech.com
800.262.3539

10:00am – 11:00am

OCTAVIUS 12-24



Jeopardy! It's not just a game show

PATRICK ADAMS, ST. LOUIS
COMMUNITY CU

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.

11:00am

Conference Adjourns

Caesars Palace Map

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Company Information

Booth #

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Abrigo provides technology that community financial institutions use to manage risk and drive growth. Our solutions automate key processes – from anti-money laundering to fraud detection to CECL readiness to lending workflows. We empower our customers by addressing their Enterprise Risk Management needs. See how Abrigo is making big things happen at www.abrigo.com.

 abrigo.com



American Share Insurance/ Excess Share Insurance (ASI/ESI) 218

American Share Insurance

American Share provides an alternative to federal deposit insurance. We cover up to \$250,000 per account – not per member – with no limit to the number of accounts that can be insured. Unlike NCUA, American Share's sole purpose is to insure consumer funds without adding another layer of regulatory burden.

 americanshare.com

Excess Share Insurance Corporation

Excess Share Insurance helps you Build Better Coverage for your credit union and your members, by insuring accounts up to \$5,000,000 over federal limits. ESI works with you to determine the best coverage limits, no matter what they might be. Build Better Coverage, with Excess Share Insurance.

 excessshare.com

Amherst Pierpont Securities LLC – Santander Group 415

With 90+ years combined experience, the Amherst Pierpont Securities Credit Union Group provides proven fixed income

investment solutions for our Credit Union Partners, making appropriate recommendations that structure investment portfolios in accordance with board-directed policy, providing the utmost support, education, training, and concise month-end accounting for all credit union investments. Member FINRA/SIPC.

 apsec.com

AmpliFi Loyalty Solutions 420

ampliFi Loyalty Solutions is an innovative fintech organization that delivers all-inclusive solutions to drive loyalty. With over 20 years of experience, 2,000+ clients and 25 million card on file, we strive to deliver high-quality loyalty experiences for cardholders and financial institutions to drive engagement and revenue. As an industry-leading digital platform provider for loyalty, we amplify engagement through a data-driven approach, sparked by leading-edge products, rooted in cultivating long-lasting relationships.

 amplifiloyalty.com

Auto Exam / Vision Warranty Corporation 220

Auto Exam and Vision Warranty Corp offer the best combination of loan protection products with unmatched member service and full service Technology solutions. We offer an all encompassing solution for both lending and collections. No-obligation consultations are available year round.

 autoexam.com | visionwarranty.net

Auto Financial Group 200

Auto Financial Group (AFG), a Houston-based company, provides an online, residual based, walk-away vehicle financing product called AFG Balloon Lending, as well as vehicle leasing and vehicle remarketing to financial institutions across the United States. AFG's residual based financing solutions provide the advantages of lower payments, flexible terms, in the case of the balloon loan,

actual ownership of the vehicle and several end-of-term options, including the option to surrender the vehicle and walk away in lieu of paying the final loan payment. Call toll free at 877-354-4234, or visit:

📍 autofinancialgroup.com

Business Compensation Consulting 305

BCC leads the industry in assisting credit unions in attracting, retaining & rewarding their leaders through the design & implementation of customized executive benefit plans, company owned life insurance (COLI), & succession planning.

📍 bcc-business.com



Catalyst Corporate Federal Credit Union 312

Catalyst Corporate Federal Credit Union is a wholesale cooperative financial institution serving nearly 1,400 credit unions nationally with innovative core financial services and exceptional back-office support. Services, designed specifically for the credit union industry, include payment solutions, liquidity, investment options and balance sheet management assistance.

📍 catalystcorp.org

Creatio 418

Creatio is a global vendor of one platform to automate industry workflows and CRM with no-code and a maximum degree of freedom. Millions of workflows are launched on our platform daily in 100 countries by thousands of clients. Genuine care for our clients and partners is a defining part of Creatio DNA.

📍 creatio.com

CU Business Group 204

CU Business Group is the premier provider of commercial lending, deposit, and consulting services to credit unions nationwide. As the largest business services CUSO in the industry, CUBG's team of 75 professionals is dedicated to helping credit unions succeed in commercial services. CUBG serves more than 650 credit unions in 48 states, providing products and technical expertise to help credit unions at all stages of the commercial services lifecycle.

📍 cubg.org



CU Conferences 211

CU Conferences has been a leader in credit union education and professional development for over 40 years. Each year, thousands of CEOs, Directors, Board Chairs, Executives, Committee Members, and management staff from credit unions across the country participate in CU Conferences' programs to learn about the latest in board development, asset management, marketing, social media, mergers & acquisitions, operations, staff development, technology tools, and to get the most targeted credit union management training available.

📍 cuconferences.com

CU Lending Advice 215

CU Lending Advice provides expert professional consultation for Credit Union management and team members. Our consultant team is dedicated to the success and implementation of proven sales efforts that benefit your Credit Union's bottom line. At CU Lending Advice, we work with your Credit Union to design training programs that meet your specific needs.

📍 culendingadvice.com

CUNA Mutual 401

CUNA Mutual Group believes a brighter financial future should be accessible to everyone. Built on the principle of “people helping people,” we have a long history of working with financial institutions to protect and grow their businesses. We enable our customers and theirs to achieve financial stability through products and solutions that stay ahead of today’s rapidly changing marketplace. CUNA Mutual Group offers commercial and personal insurance products, lending solutions, retirement plans, investment products, data and analytics, and marketing services. Learn more at:

🌐 www.cunamutual.com

**CU Solutions Group 121**

CU Solutions Group serves the credit union industry through technology, marketing, performance and strategic advisory solutions, and is home of the well-known membership enhancement program Love My Credit Union® Rewards. The organization is dedicated to helping its clients serve, grow and remain strong. Learn more at:

🌐 CUSolutionsGroup.com

Elan Advisory Services 210

Elan Advisory Services partners with financial institutions to grow their business through our outsourced credit card program, mortgage solutions, and our all-in-one merchant processing business solution platform, talech®. Our dedication to our partners, growth philosophy, and investment in evolving technology has made us a leader in the industry since 1968. In a world of rapidly changing digital technology, increasing compliance burdens, and competing rewards programs, more have turned to Elan for innovative solutions. For more information, visit:

🌐 elanadvisoryservices.com

Executive Benefit Solutions 307

Executive Benefits Solutions specializes in helping credit unions develop investment strategies to manage investment portfolios, control employee benefit expenses and retain key executives who proactively implement those strategies.

🌐 ebstoday.com

FLEX 201

FLEX utilizes the most advanced technologies to create unmatched integration for credit unions. Secure open architecture allows credit unions direct access to their data without the need for vendor support or cost. Open APIs provide flexibility when choosing third-party solution providers and allow for direct system integration. If you haven’t experienced FLEX, don’t take it from us, visit one of our 260 plus customers.

🌐 flexcutech.com

FSI (Financial Supermarkets, Inc.) 115

Celebrating nearly forty years as the official provider of The Supermarket Bank®, Financial Supermarkets, Inc. is the nation’s leader for attractive, functional, and professionally designed in-store and storefront financial centers. Financial institutions of all sizes partner with FSI to efficiently expand their branch network while maximizing touch-points with their customers/members.

🌐 supermarketbank.com

Gallagher Executive Benefits 212

Gallagher Executive Benefits consults with credit unions on recruiting, retaining, and rewarding their key leaders. We help you secure your future through leadership continuity and aligning executive performance with strategic goals. Gallagher specializes in nonqualified benefits, such as split dollar plans, 457(f) plans, life insurance, and bonus and incentive plans. Our expertise includes investment asset management and charitable donation accounts. More than

500 credit unions trust Gallagher to retain and incentivize their key leaders. Gallagher is the NAFCU Preferred Partner for Executive Benefits and Compensation.

🌐 gallagherexecben.com

General Informatics 407

General Informatics is a team of technology enthusiasts with one mission: Inspire others to solve business challenges through the best use of technology. Our managed services teams can run your digital infrastructure or support your team on an on-demand basis, letting you focus on your business strengths. With a continuously growing portfolio of diverse technology services, General Informatics has helped clients realize significant growth through innovative technology deployment and exceptional service delivery. More information can be found at:

🌐 geninf.com

Geraci 203

Geraci Law Firm is focused solely on creditor representation. Its robust nationwide lending compliance and loan documentation team prepares nationwide loan documents, modifications, extensions, participations, intercreditor agreements and all other loan related transactional documents. Geraci Law Firm is a go-to resource for attorney prepared documents nationwide.

🌐 geracillp.com

GreenPath Financial Wellness 406

Our mission is to empower people to lead financially healthy lives. GreenPath has formal partnerships with over 550 credit unions across the country to empower members to prepare for life's ups and downs and build the financial foundation for their dreams. Our guiding principle is to put members at the center of everything we do. Behavioral economics, empathy, coaching, and human-centered design practices anchor our work in meeting member's needs.

🌐 greenpath.org

iMakeNews Inc. (IMN) 414

iMakeNews Inc. (IMN) is a digital marketing company that delivers engaging email communications that educate and connect with credit union members and prospects. IMN offers a complete email marketing service with dynamic newsletters, extensive distribution capabilities, relevant content, and accurate behavioral analytics for every campaign.

🌐 imninc.com

Interface 411

interface.ai is a market-leading provider of Intelligent Self-Service for credit unions. interface's AI acts as a "personal bank teller" to help members 24x7 through every step of their journey from being a prospect to achieving financial wellness. interface currently powers several credit unions across North America, has enabled millions of dollars in savings for its CU customers and is one of the fastest-growing credit union providers, growing at over 1500% just in the last year.

🌐 www.interface.ai

Larky 410

Larky solves the problem of trying to get your members' attention by using a new channel to proactively communicate with them— one they are already on. The Larky platform delivers tailored push notification campaigns directly through the mobile banking app. These customizable campaigns produce 5x more engagement than traditional marketing. As a result, Larky helps credit unions grow sales of their products and services and create meaningful, lasting relationships with their members.

🌐 larky.com

Lucky Soap 111

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 LuckySoapLV.com

Luse Gorman314

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 www.luselaw.com

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Mahalo Banking311

Mahalo Technologies, Inc. provides online and mobile banking solutions for credit unions. Based in Troy, Mich., the Mahalo platform is designed and built on superior architecture with deep integration to core processing, providing security and a robust feature set across all delivery

channels for a true omni experience. Mahalo banking is feature-rich and price competitive to help all credit unions achieve a technology advantage in the marketplace.

 mahalobanking.com

MOCA Financial 103

MOCA provides a digital-first nextgen card-based payment platform for people and business. Based near Austin, Texas, MOCA was founded and is managed by community financial institution veterans with over 125 years of combined fintech, payments, and community financial institution experience. We are prior founders and alumni of familiar names, such as FundsXpress, Kasasa, Buzz Points, Towny, and others, and are proud to continue helping community financial institutions remain competitive and thrive with MOCA.

 mocapay.com

MVi (Millennial Vision Inc)319

MVi-Millennial Vision, Inc. provides a complete suite of Enterprise Content Management including Document Imaging. Our suite includes: Check 21 processing, Laser Check printing and capture, Loan Document Capture, paperless receipt technology, photo ID and COLD Report Systems. Reduce expenses, improve service and provide important business continuity solutions with MVi.

 mviusa.com

myCUMortgage213

myCUMortgage is obsessed with assisting credit unions nationwide grow their mortgage business and help members achieve their dream of homeownership. Our Credit Union Service Organization (CUSO) delivers comprehensive mortgage solutions that make credit unions great mortgage lenders, including training, marketing, originations, processing, underwriting, servicing, secondary market access and a full suite of conventional and government products. Plus, we offer the flexibility to incorporate your

portfolio loans and the ability to choose to retain servicing on those loans.

 **myCUMortgage.com**

nCino 119

nCino (NASDAQ: NCNO) is the worldwide leader in cloud banking. The nCino Bank Operating System® empowers financial institutions with scalable technology to help them achieve revenue growth, greater efficiency, cost savings and regulatory compliance. In a digital-first world, nCino's single cloud-based platform enhances the employee and client experience to enable financial institutions to more effectively onboard clients, make loans and manage the entire loan life cycle, and open deposit and other accounts across lines of business and channels. Transforming how financial institutions operate through innovation, reputation and speed, nCino is partnered with more than 1,750 financial institutions of all types and sizes on a global basis. For more information, visit:

 **www.ncino.com**



Open Lending 105

Open Lending specializes in loan analytics, risk-based pricing, risk modeling, and automated decision technology for automotive lenders throughout the United States. Its proprietary product, Lenders Protection™, is a risk management program featuring default insurance coverage for near-prime and non-prime auto loans. Its unique auto lending enablement platform allows 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.

 **openlending.com**



Podium 304

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 **podium.com**

PSCU 300

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 **pscu.com**



PURE IT Credit Union Services 306

Pure IT Credit Union Services provides strategic IT consulting, assessments, and managed services for credit unions looking to elevate technology to enable their organization and gain a competitive edge. Comprised of a team of experienced architects and consultants, Pure IT is a trusted partner that provides clear documentation and strategy roadmaps to better position credit unions to serve their members.

 **PureITCUSO.com**

Quilo.....402

Quilo is an all-digital, unsecured personal installment loan that can be used three ways by members: (1) make a new purchase online or in store, (2) pay down credit card balances, and (3) replenish checking account for debit card purchases. Quilo, our flagship lending platform, enables community banks and credit unions to originate and service instant installment loans, providing account holders with immediate access to funds and no hidden fees.

 quilocloud.com


Sharetec Systems Inc.....310

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 sharetec.com

Stearns Financial Group.....207

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 stearnsfinancial.com

Strategic Resource Management, Inc.....405

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StrategyCorps.....301

StrategyCorps works with hundreds of financial institutions nationwide to deliver mobile and online consumer checking solutions that enhance customer engagement and increase fee income. This includes two premier products – CheckingScore, an analytical tool that ranks each customer's total financial productivity, and a customizable BaZing mobile rewards app that delivers thousands of local merchant discounts and name-brand national retailer offers to their mobile phone, among other protection benefits.

Contact: (888) 577-6933 | info@strategycorps.com

 strategycorps.com


SWBC Executive Benefits.....321

SWBC Executive Benefits provides businesses with creative, compliant solutions that proactively manage compensation-based executive benefit programs.

 swbc.com/executive-benefits

The Sheeter Group.....400

The Sheeter Group works exclusively with credit unions designing 457(f), Collateral Assignment Split Dollar (CASD), Post-Retirement Health Care, Section 162 Bonus, and Employee Benefits Expense Offset plans. We develop and implement plans to Attract, Retain and Reward Executives that are essential to the success of the Credit Union.

 sheetergroup.com

Trellance.....205

Trellance is a leading provider of business analytics and technology consulting for credit unions, helping them meet the financial needs of today's digital consumer. With a comprehensive suite of data science solutions, professional

staffing and professional services, the Trellance team ensures credit unions increase efficiency, manage risk, and improve member experience. As credit unions' tech partner, Trellance brings them to the next frontiers of fintech, filled with powerful tools such as artificial intelligence and machine learning. Data In. Insights out. Learn more at:

 www.trellance.com

Trileaf Environmental.....206

Trileaf is a specialized environmental, architecture, and engineering firm with clients in all 50 states and throughout Canada. Known for completing large volumes of small-to-medium-sized projects across large geographies, we have the expertise our clients need.

 trileaf.com

United Solutions Company.....101

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 unitedsolutions.coop


“ CU Leadership offers the opportunity to get in front of key decision makers. With approximately 1400 people in attendance, you are guaranteed to get the traffic you need to make it a successful show.”

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— JULIE NIELSEN, VP, OPEN LENDING

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