

Join the nation's most innovative credit union leaders at...



LEADERSHIP CONVENTION

JULY 25-28, 2023 CAESARS PALACE

Las Vegas

DISCOVER.
EXPERIENCE.
GROW.

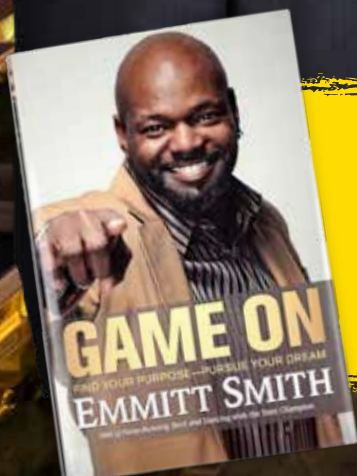
SAVE UP TO

\$170

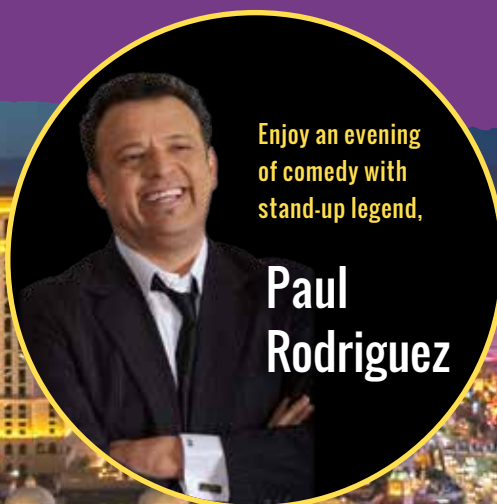
REGISTER NOW AT

CULeaders.com

60+ SPEAKERS... 63 SESSIONS... 8 BREAKOUT SUMMITS...
ALL AT THE #1 EVENT FOR CREDIT UNION LEADERS



#1 Leading Rusher in
NFL History, 3 Time
Super Bowl Champion,
Bestselling Author



Enjoy an evening
of comedy with
stand-up legend,

**Paul
Rodriguez**

SAVE UP TO **\$170 PER PERSON**
WHEN YOU SEND 7+ ATTENDEES



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LEADERSHIP

C O N V E N T I O N

JULY 25-28, 2023 CAESARS PALACE

Las Vegas

DISCOVER.
EXPERIENCE.
GROW.

**You're invited to the #1 event for
growth-minded CU Leaders**

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

Who should attend?

- > CEOs & Presidents
- > Board Chairs/Directors
- > Supervisory Committee Members
- > Chief/VP of DEI
- > Chief/VP of Marketing
- > Chief/VP of Finance
- > Chief/VP of Lending
- > Chief/VP of Technology
- > Chief/VP of HR
- > Chief/VP of Lending & Business Lending

Previously known as the Directors' Conference, the Directors & CEO Conference and now the CU Leadership Convention, we have always strived to deliver the very best information to help your credit union grow. For 45 years, the conference has delivered the best content, packed with practical guidance and innovative solutions from the country's leading SMEs, CEOs, executives, directors and consultants willing to share what's working – and what's not.

This year is no exception! Join us in Vegas to share ideas, network and learn from the country's leading credit union experts. This year's convention features:

- > 63 sessions with real-world guidance from CEOs, directors and SMEs.
- > 8 NEW Breakout Summits on today's hottest topics, including lending, HR, leadership, fintech and more. Pick and choose your favorite topics!
- > 4 NEW Deep Dive Pre-Conference Workshops on big data, financial management, M&As and strategic planning.
- > Expanded Breakfast of Champions idea exchange (limited to the first 300 paid attendees).
- > NEW exhibit hall featuring 50+ solution providers.
- > Opening night Hawaiian luau celebration with music, dance and mouth-watering, authentic Polynesian dishes.
- > And much more!

Since we are not an association or a CUSO, we deliver unvarnished perspectives from the industry's leading thought leaders, so you have the information you need to better serve your communities, your members and your employees. This commitment to top-quality content and thought-provoking speakers – all while in America's most exciting city – makes the CU Leadership Convention a must-attend event for any credit union leader.

We look forward to seeing 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

Featured Keynote Speaker

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Emmitt Smith

Game On: A Championship Vision for Credit Unions

A respected entrepreneur, bestselling author, and one of the most valuable personal brands in the sports-entertainment field — these are just a few of the ways to describe Emmitt Smith. His illustrious football career includes three Super Bowl championships as a member of the Dallas Cowboys and the honor of being the only player to have won a Super Bowl MVP, NFL MVP and NFL Rushing Crown in the same season. Join Emmitt as he talks about adapting to change and overcoming obstacles, achieving goals, leadership and teamwork — while highlighting his journey as a football player, businessman and even “Dancing with the Stars” champion.

**#1 Leading Rusher in
NFL History, 3 Time
Super Bowl Champion,
Bestselling Author**



ONE TICKET = ALL SESSIONS

See an incredible
line-up of **SPEAKERS!**

Featuring **8 NEW! Breakout Summits** with more than **60 thought-provoking sessions from 60 expert speakers!** ONE ticket gives you an ALL-ACCESS pass to ALL Breakout Summits. Pick and choose from dozens of terrific sessions.

- › Leadership Summit
- › Lending Summit
- › Fintech Summit
- › Financial Summit
- › Human Resources Summit
- › Marketing & Branding Summit
- › African-American Leadership Summit
- › Trending Summit



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WHEN YOU SEND **7+ ATTENDEES**



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Pre-Conference Workshops

PRECONFERENCE



PRE-CONFERENCE WORKSHOP #1

Mergers & Acquisitions: Opportunities and Pitfalls Every CU Should Know

Peter Duffy, Managing Director, Piper Sandler;
Glenn Christensen, President, CEO Advisory Group



PRE-CONFERENCE WORKSHOP #2

Shift Happens: 4 Trends That Are Shaping How CUs Do Business and How to Leverage Data Analytics

Anne Legg, Founder & President, Thrive Strategic Services



PRE-CONFERENCE WORKSHOP #3

Financial Management: Deciphering the Numbers for Better Decision-Making

Tim Harrington, CPA, President, TEAM Resources

TUESDAY, JULY 25, 2023

10:00 am - 5:00 pmConvention Registration Opens
1:00 pm - 4:00 pmPre-Conference Workshops

WEDNESDAY JULY 26, 2023

7:00 am - 8:45 amExhibit Hall Opens & Continental Breakfast
9:00 am - 10:00 amOpening Keynote with Emmitt Smith
10:00 am - 10:30 amGeneral Session - Leadership Roundtable
10:30 am - 11:00 amNetworking Break in Exhibit Hall
11:10 am - 12:00 pmGeneral Session: 6x6 - 6 Speakers Sharing their Best Ideas
12:00 pm - 12:30 pmNetworking Luncheon
12:30 pm - 1:15 pmNetworking and Dessert in Exhibit Hall
1:15 pm - 1:40 pmBreakout Summits Sessions
1:50 pm - 2:20 pmBreakout Summits Sessions resume
2:30 pm - 2:55 pmBreakout Summits Sessions resume
3:00 pm - 4:00 pmHappy Hour in the Exhibit Hall
7:30 pm - 8:30 pmEnjoy an evening of comedy with stand-up legend, Paul Rodriguez

THURSDAY JULY 27, 2023

7:30 am - 8:45 amContinental Breakfast in Exhibit Hall
Breakfast of Champions
9:00 am - 9:45 amKeynote Address
9:45 am - 10:00 amLeadership Awards
10:15 am - 11:00 amBreakout Summits Sessions resume
11:00 am - 11:45 amNetworking Break in Exhibit Hall
11:45 am - 12:30 pmRoundtable Discussions & Breakout Summit Sessions
12:30 pm - 1:00 pmNetworking Luncheon
1:00 pm - 1:45 pmNetworking & Dessert in Exhibit Hall
1:45 pm - 2:15 pmBreakout Summits Sessions
2:30 pm - 3:00 pmBreakout Summits Sessions

FRIDAY JULY 28, 2023

7:30 am - 9:00 amBuffet Breakfast
9:00 am - 10:00 amGeneral Session
10:00 am - 11:00 amGeneral Session
11:00 amAdjourn

AGENDA-AT-A-GLANCE



Enjoy an evening of comedy with stand-up legend,

Paul Rodriguez

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

Enjoy a hilarious opening-night reception with legendary stand-up comic, Paul Rodriguez. For nearly three decades, Paul Rodriguez has been making audiences laugh all over the world with his unique brand of humor that is a perfect blend of his Latin heritage, the American dream and his undeniable universal appeal. Named by Comedy Central as one of the “100 Greatest Standups of All Time,” Paul Rodriguez starred in “The Original Latin Kings of Comedy” and appeared on America’s favorite late night TV shows including “The Wanda Sykes Show,” “The Tonight Show with Jay Leno,” “Last Call with Carson Daly,” and “Politically Incorrect” in addition to playing voice overs on “King of the Hill” and “Dora the Explorer”. Register today as an attendee or guest, and don’t miss your chance to see the comedy legend!

Guest Experience Packages

CHOOSE 1 OF 2 OPTIONS
THURSDAY AFTERNOON, JULY 27

PACKAGES INCLUDE

- One admittance to our Opening Night Hawaiian Luau
- One admittance to a Guest Experience
- Access to ALL refreshment breaks, plated luncheons & dessert socials.
- All conference breakfasts (not including Breakfast of Champions).



1 THE BOB ROSS JOY OF PAINTING SIPPING EXPERIENCE

Paint a mountain retreat or a meadow lake with a Certified Bob Ross instructor as you create your happy little masterpiece while enjoying your favorite beverage to keep the creative juices flowing.



2 DAY DRINKING WITH MAGICIANS AT THE LOST SPIRITS DISTILLERY

Experience a distiller tour, a rum tasting and a magic show all at once at the Lost Spirits Distillery where you are transported to a different time and place. Fun for drinkers and non-drinkers alike.

Breakout Summits 60+ Speakers... 63 Sessions... 8 Breakout Summits...

2023 SPEAKERS



JUST ADDED! The Leadership Journey & Road Ahead for Credit Unions -

Insights from NCUA Chairman Todd Harper

As the first NCUA staff person to become a Board Member and Chairman of the NCUA, Todd Harper has a unique understanding of credit unions. Join us for Chairman Harper's keynote address, Thursday, July 27, as he talks about his own leadership journey, NCUA's regulatory priorities, and the outlook for credit unions following the most recent banking crisis, unprecedented interest rate hikes, and an evolving financial landscape. Find out how the credit union movement's top regulator views the road ahead as he discusses the challenges and opportunities facing directors and C-suite leaders.



M&A Do's & Don'ts

Peter Duffy, Managing Director,
Piper Sandler



DEI and Creating Leadership Opportunities for All

Renée Sattiewhite, President/CEO,
African-American Credit Union Coalition



Growth Through Mergers

Glenn Christensen, President, CEO
Advisory Group



Managing for Better Financial Performance

Tim Harrington, President, TEAM
Resources



Change Management for Better Performance

Dohnia Dorman, Chief Experience
Officer, African-American Credit
Union Coalition



Leveraging Big Data as Shift Happens

Anne Legg, Founder & President,
Thrive Strategic Services

SAVE UP TO **\$170 PER PERSON**
WHEN YOU SEND **7+ ATTENDEES**



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Breakout Summits (continued)

2023 SPEAKERS



Branding Tactics That Can Generate 10x ROI

James Robert Lay, CEO, Digital Growth Institute



Game On: A Championship Vision for Credit Unions

Emmitt Smith, #1 Leading Rusher in NFL History, 3 Time Super Bowl



Recruit, Retain, Mentor and Motivate in a Crazy Job Market

Shari Storm, CEO, Category 6



Attracting Minority Leaders to the C-Suite

LaSonya Berry, CEO, McPherson, Berry & Associates



Crypto Currency and Its Impact on CUs

Lamont Black, Futurist & Professor, DePaul University



6 Components of Emotional Intelligence and Why It Matters

Roger Wolkoff, Chief Authenticity & Relationship Expert



Capturing the Hearts, Minds and Wallets of Consumers Under 25

John Lanza, author, The Art of Allowance



Honest Conversations About DEI in the C-suite

Tyrone Muse, CEO, Visions FCU



Developing an Innovation Mindset

Val Mindak, CEO & President, Park City Credit Union

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Breakout Summits (continued)

2023 SPEAKERS



Best Practices for Transformational Leadership

Milton Hunt, President, Author of 10



The Transformative Power of Human Connection

Scotty Wiese, World-Class Magician



How to Reverse Declining Member Satisfaction

Mark Galauner, Program Director, American Customer Satisfaction



Second Chance Hiring: Sourcing Overlooked and Untapped Talent

Ty Reed, MBA, Recovery Career Services



Recruiting for Diversity and Innovation on the Board

Maurice Smith, Retired CEO, Local Government FCU



Managing Risk in Unprecedented Times

Ancin Cooley, CIA, CISA, Founder & Principal of Synergy Credit Union Consulting, Inc



What's Working: Developing a Diverse Leadership Team

Delana Huling, President & CEO, Baylor Health Care System CU



Marketing Across Generations

Mark Arnold, Founder & CEO, On the Mark Strategies



Hidden Opportunities for Profitable and Sustainable Growth

Pablo DeFillipi, Executive VP, Inclusiv Network

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Breakout Summits (continued)

2023 SPEAKERS



The Last Lecture: Lessons Learned From 40+ Years in the Movement

Patrick Adams, Strategic Advisor,
St. Louis Community CU



How Fintech is Transforming PFI to Primary Financial Interactions

Dave DeFazio, Partner, StrategyCorps



Risk Management & New Examiner Focus

Emily Hollis, CEO, ALM First
Financial Advisors



Go Underground and Get Sh!t Done

Susan Mitchell, CEO, Mitchell,
Stankovic & Associates



Untraditional Revenue Stream Options

Sara Dolan, CFO, MSU FCU



Data Driven Approaches to Understanding Member Behavior

Janice Hollar, CFO, Achieva CU



Profitable Lending Tactics

Brian Bone, President/CEO,
American Partners FCU



Embracing Risk for Greater Loan Growth

Jeremy Garza, President/CEO, Gulf
Coast FCU



M&A Landscape: Key Considerations for Directors & CEOs

Jeff Cardone, Partner, Luse
Gorman, PC

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Breakout Summits (continued)

2023 SPEAKERS



Attracting & Engaging Younger Members

Juli Lewis, Chief Relationship Officer, Michael Walters Advertising



New Shifts in the Foundation of "Banking"

Dave Koch, Director, Advisory Services, Abrigo



CUs & Fintechs – A Brand New World of Opportunity

John Janciales, President, NYMBUS CUSO



Untapped Lending Opportunities that are Good for Your Community and Your CU



Leveraging Embedded Finance for a Superior Member Experience

Corrin Maier, VP, Lending Consumer



SmartSourcing – Strategies That Drive Profit and Enhance Member Loyalty



Meeting Mastery: Secrets of High Performing Boards

Keith & Rebecca Klein Scott, Owners, TALLsmall Productions, LLC



Solving America's Biggest "Hidden" Problem

Mike Scheid, Executive Director, Community Impact Fund



Solutions to Creating Financial Well-Being for All

Daniel Bednar, Chief Strategy Officer, CBC FCU

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Breakout Summits (continued)

2023 SPEAKERS



The Future of Work: How to Compete for the Best & Brightest at Your CU

Jill Nowacki, President/CEO,
Humanidei



How to Dominate Member Satisfaction – Solutions from the Front Lines

Heather Pizzala, VP of Marketing,
Genisys Credit Union



Underground Collision – The Power of Generative AI: The Good, The Bad and The Ugly

Amber Harsin, CEO, CU Prodigy



The Future of AI and Credit Union

George Estrada, Principal Strategic
Advisor, Amazon Web Services



Digital Banking: A Tactic to Support (not replace) Branches

Ed Chuang, EVP & CIO, Logix FCU



Leading Change from the Front Counter to the C-Suite

Liz Ponder, Executive Vice



Auto Lending: Serving the Underserved Profitably and Equitably

Matt Roe, Chief Revenue Officer,
Open Lending



Hidden Opportunities for Profitable and Sustainable Growth

Richard Romero, President & CEO,
Seattle CU



Attracting & Engaging Younger Members Against a Growing Pool of Competitors

Jim Lake, Managing Partner,

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Breakout Summits (continued)

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

2023 SPEAKERS



Managing your Internal & External Cybersecurity Teams

Andrew Hay, Lares Consulting



Competing with Banks & Fintechs Using Predictive Analytics

Stef Luck, VP Sales, Trellance



Turning Data into Action

Maggie Chopp, Sr. National Sales Executive, Trellance

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Venue Information



It's time to indulge and treat yourself while learning and networking at the 46th CU Leadership Convention. Play, dine and unwind like royalty at Caesars Palace Las Vegas: the remarkable, palatial, center-strip resort. From luxurious hotel rooms to world-class entertainment, it's time to experience a trip that's one for the books.

Caesars Palace Las Vegas

3655 Las Vegas Blvd. S., Las Vegas, NV 89109

Room Rate: \$179 per night/\$20 per night resort fee plus taxes & fees

Cut-Off Date: June 29, 2023

All convention registrants also get these exclusive benefits as guests at Caesars Palace:

- Unlimited local phone calls
- Two (2) guest admissions per day to the Fitness Center
- In-room internet access includes two (2) devices per room per day

Questions? Need Assistance?

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

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

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, 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.

Property allows individual attendee cancellations without penalty up to seventy-two (72) hours prior to the attendee's scheduled arrival date. Property will charge the individual attendee one night's guestroom rate plus tax for cancellations within seventy-two hours (72) hours of the scheduled arrival date or failure of the individual attendee to check-in on the scheduled arrival date (each a "no-show"). It is Property's standard policy to require a credit card or cash deposit from individual attendees upon check-in for incidental charges. Hotel check in time is 4:00 pm. Check out time is 11:00 am. Any departures after 11:00 AM are subject to the full day charge. Each guestroom must have at least one registered guest twenty-one (21) years of age or older.

Convention Discount Rate Passcode

book.passkey.com/go/SCCUC3



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Sponsors & Exhibitors

The ALL-NEW 46th 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.

SAVE UP TO

\$170

REGISTER NOW AT

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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

"Speakers and topics were great. They addressed some areas that are hot topics in the industry and motivated me to get back to my CU."

— Jason Hagadone, VP Business
Lending, Altana FCU

1 OUT OF 12 CREDIT UNIONS IN ATTENDANCE



60+ SPEAKERS SHARING BEST-PRACTICES
AND PRACTICAL SOLUTIONS

1,400+

CU EXECS, DIRECTORS &
KEY DECISION-MAKERS

67%

C-SUITE
EXECS/VPS



For more information
contact **Jimmy Kurtovic**



jimmy.k@culeaders.com



(646) 356-4504

Registration



✓ YES! Sign us up for the 46th 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 WORKSHOPS	GUEST REGISTRATION
\$1,495 \$1,420*	\$395	\$595

✓ YES! Our CEO wants to join us.

CONFERENCE REGISTRATION	PRE-CONFERENCE DEEP-DIVE WORKSHOPS	GUEST REGISTRATION
\$695	\$395	\$595

* Discount expires on Friday, June 9, 2023. Full price after this date.

Special Group Pricing

Save up to \$170 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 \$1,420 SAVE \$75 EACH	Attendee Rate is \$1,375 SAVE \$120 EACH	Attendee Rate is \$1,325 SAVE \$170 EACH




Questions?

Call 866-620-5937

Customer service team is available M-F, 9:00am-5:00pm Eastern.



3 Ways to Register

-  www.CULeaders.com
-  CALL 866-620-5937
-  registrar@CULeaders.com



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

Cancellations and Substitutions:

Our cancellation and substitution policy are as follows: If you're unable to attend, you're welcome to send a substitute. Or, if you cancel in writing by Thursday, May 5, 2023, 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.



Las Vegas

Featuring **8 BREAKOUT SUMMITS** with
more than **60 THOUGHT-PROVOKING
SESSIONS** from **60+ EXPERT SPEAKERS!**

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



- 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



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



- 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



- 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



- 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



- Discover how one CU is leading the movement with cryptocurrency
- Learn the top 3 emerging risks every executive needs to know
- Learn to apply big changes affecting strategy, structure, governance & leadership



- Find out how to implement meaningful and impactful cultural change
- Discover practical steps to create a diverse workforce
- Learn firsthand how CUs are leveraging DEI to grow their membership and ROA



- 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



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