

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



# LEADERSHIP CONVENTION

AUGUST 12-15 2025, CAESARS PALACE

*Las Vegas*

DISCOVER.  
EXPERIENCE.  
GROW.

Featuring 3 inspiring and thought-provoking keynote speakers...



**NFL Legend  
Joe Theismann**  
Challenge of Change



**Humorist & AI Expert  
Janelle Shane**  
What AI Can Do - and Can't



**Organizational  
Change Expert  
Dr. James Pogue**  
Leadership in the Face of Chaos




60+ SPEAKERS

63 SESSIONS

9 BREAKOUT SUMMITS

SAVE UP TO  
**\$340**

 [CULeaders.com](https://CULeaders.com)

 646-795-3261  
ext 832





**LEADERSHIP**  
C O N V E N T I O N  
AUGUST 12-15 2025, CAESARS PALACE

*Las Vegas*

**DISCOVER.  
EXPERIENCE.  
GROW.**

**YOU'RE  
INVITED!**

## Join the country's most innovative CU leaders in Vegas at the 48th CU Leadership Convention.

There has never been a more crucial time for credit union C-Suite executives, directors and decision-makers to gather and determine the path forward amidst an everchanging regulatory backdrop.

Join 1400+ of your peers to share ideas, network and learn how to grow your CU from the country's leading experts.

### **This year's convention features:**

- 63 sessions with real-world guidance from CEOs, directors and SMEs.
- 9 NEW Breakout Summits on today's hottest topics, including lending, HR, leadership, fintech and more. Pick and choose your favorite topics!
- 3 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 entertainment and reception.

Since we are not an association or a CUSO, we deliver unbiased perspectives from the industry's most influential 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 delivered by thought-provoking speakers – all while in America's most exciting city – makes the CU Leadership Convention a must-attend event for any innovative 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

**CULeaders.com**

**2**





## KEYNOTE SPEAKER

# JOE THEISMANN

## Champion Quarterback, Accomplished Broadcaster, and World-Class Entrepreneur

Joe Theismann is an entrepreneur and the former star quarterback for the Washington Redskins. Most recently, he spent the last 2 decades working for ESPN and the NFL Network as an NFL analyst.

Joe graduated in 1971 from the University of Notre Dame, where he received All-American honors in both Football and Academics. That same year, he was runner up to Jim Plunket for the Heisman Trophy balloting. Joe chose to begin his career with the Toronto Argonauts of the Canadian Football League after being drafted by the Miami Dolphins and Major League Baseball's Minnesota Twins.

A 12-year NFL veteran, Joe played in 163 consecutive games from 1974-1985 for the Washington Redskins and holds Redskin records for passing yardage (25,206), completions (2,044) and attempts (3,602). He was a two-time Pro Bowl selection and Pro Bowl MVP leading the Washington Redskins to a 27-17 victory over the Miami Dolphins in Super Bowl 17.

Joe was selected as the NFL's Man of the Year in 1982 for his community service and dedication to the health and welfare of children. In 1983, he won the league's Most Valuable Player Award, leading the Redskins to a second consecutive Super Bowl appearance.



Drawing from personal experience, Joe Theismann knows how to deal with the Challenge of Change. On November 18, 1985, he was on top of his game - a two-time Pro Bowl player and the most productive quarterback in the history of the Washington Redskins. Later that evening, he found himself in a hospital bed with a compound fracture to his leg, shattering both his career and his boyhood dream. At age thirty-five, he was faced with starting over his personal life and professional career. In this stirring presentation, credit union leaders will learn how to tackle change by keeping a positive mental outlook and committing to a vision that guides you to the top.





**KEYNOTE SPEAKER**

# JANELLE SHANE

## Artificial Intelligence Speaker, Humorist What AI Can Do - and Can't

AI is making headlines and disrupting banking. But what IS artificial intelligence, and what is it good at?

AI expert Janelle Shane takes a weird and humorous approach to a complex topic and talks about the kinds of problems where AI will succeed, fail, or succeed at solving the wrong problem entirely.

She has been featured on the main TED stage, in the New York Times, The Atlantic, WIRED, Popular Science, All Things Considered, Science Friday, and Marketplace, as well as being Futurist in Residence at the Smithsonian.

Her book, “You Look Like a Thing and I Love You: How AI Works, Thinks, and Why It’s Making the World a Weirder Place” uses cartoons and humorous pop-culture experiments to look inside the minds of the algorithms that run our world, making artificial intelligence and machine learning both accessible and entertaining.

Shane was named one of Fast Company’s 100 Most Creative People in Business, and an Adweek Young Influential.



Janelle Shane’s AI humor blog, [Alweirdness.com](http://Alweirdness.com), looks at the strange side of artificial intelligence. She has been featured on the main TED stage, in the New York Times, The Atlantic, WIRED, Popular Science, All Things Considered, Science Friday, and Marketplace, as well as being Futurist in Residence at the Smithsonian.

Her book, “You Look Like a Thing and I Love You: How AI Works, Thinks, and Why It’s Making the World a Weirder Place” uses cartoons and humorous pop-culture experiments to look inside the minds of the algorithms that run our world, making artificial intelligence and machine learning both accessible and entertaining. Shane was named one of Fast Company’s 100 Most Creative People in Business, and an Adweek Young Influential.

She also works as a research scientist in Colorado, where she makes computer-controlled holograms for studying the brain, and other light-steering devices. She has only made a neural network recipe once and discovered that horseradish brownies are about as terrible as you might imagine.





## KEYNOTE SPEAKER

# DR JAMES POGUE

## The Connection Quotient: Elevating the Industry Experts to A Leadership Powerhouse

In many credit unions, leaders are often promoted for their technical expertise, with the expectation that their leadership abilities will evolve.

While this can be the case for some, for others, the transition to effective leadership doesn't always happen naturally.

So, what happens when disruption strikes? When change accelerates into full-scale chaos?

Leaders who lack practiced leadership skills in key organizational areas often manage teams that are disengaged, less productive, and ultimately less profitable.

In this session, we will explore proven strategies that enable leaders to identify and address their leadership gaps. Attendees will engage with The Connection Quotient, a sophisticated assessment tool designed to help leaders build stronger teams, drive deeper engagement, and cultivate a thriving organizational culture.



This session will underscore the importance of having a clear, actionable roadmap to elevate industry experts into true leadership powerhouses. Participants will leave with practical insights and tools to transform leadership potential into impactful, sustainable success.

**James Pogue, Ph.D., CEO, JP Enterprises**





# ONE TICKET = ALL SESSIONS!

See an incredible line-up of speakers!



## Featuring 9 NEW! Breakout Summits

with 63 thought-provoking sessions from dozens of new thought leaders... plus, our returning all-star 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
- AI Summit
- Trending Summit
- Growth Summit





# JOIN US AS WE HONOR THE 2025 NEOTERIC CHANGEMAKER!

**Nominations are now open for the Neoteric Changemaker Award for 2025.  
Winner(s) will be announced at the 48th CU Leadership Convention.**

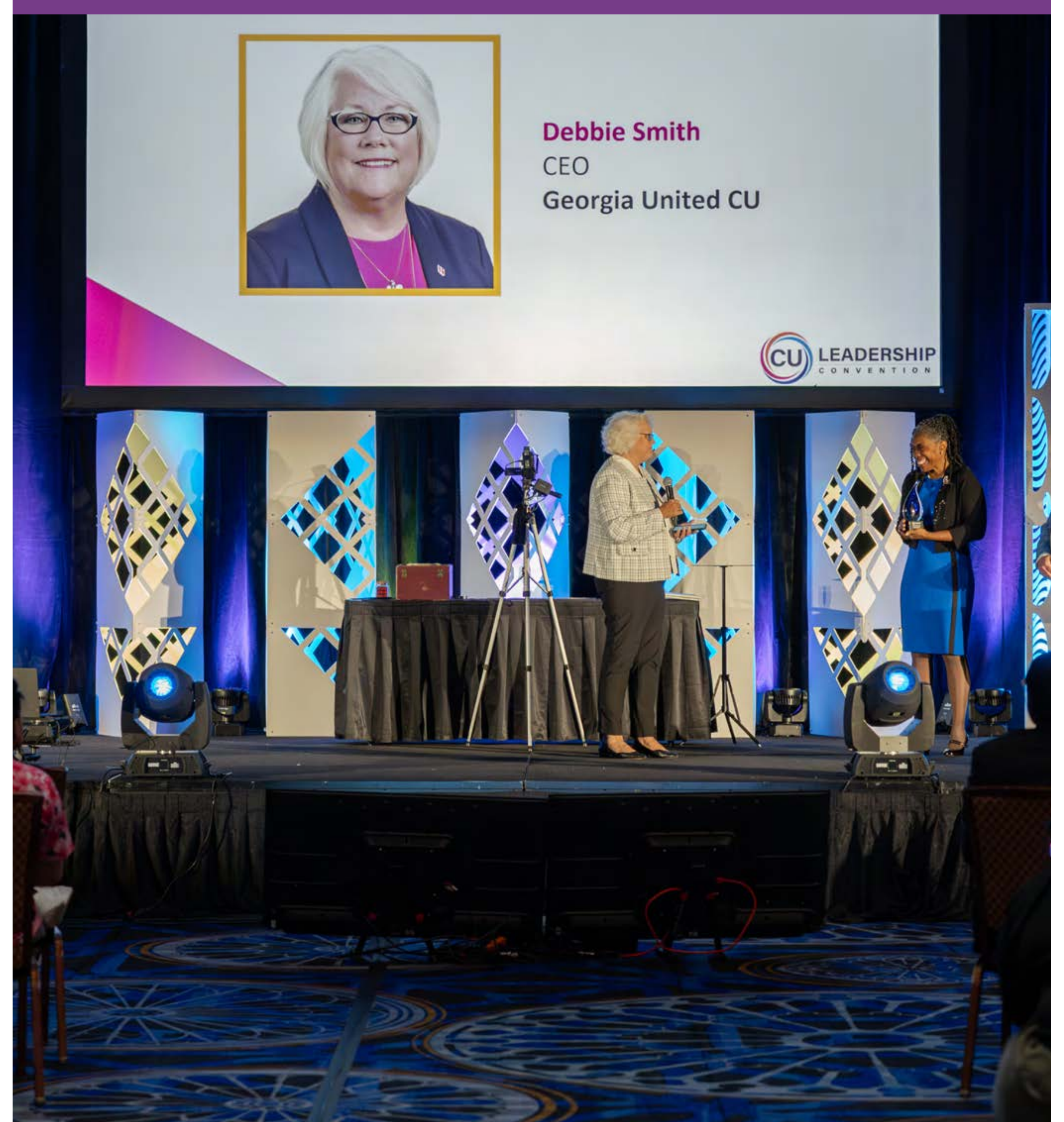
Named after the first recipient of the award, Renée Sattiewhite, CEO and President of the African-American Credit Union Coalition, this national award recognizes those who have demonstrated personal perseverance, advanced the cause of “people, helping, people,” advocated for relevant ideation, and created positive programming for leaders.

The unique name of the award was selected because it represents the literal meaning of the word neoteric: A modern person who advocates for new ideas.

Anyone may submit a nomination for the Renée Sattiewhite Neoteric Changemaker Award. Nominations must clearly document why the candidate or team should be considered, above all others, for this distinguished award. More details and nomination instructions can be found at [www.CULeaders.com](http://www.CULeaders.com)

Recipient(s) will receive an award with their name engraved, which recipient(s) may keep. Each recipient(s) will also receive two complimentary registrations to the 2026 CU Leadership Conference.

**Submissions are due by June 13  
at: [www.CULeaders.com](http://www.CULeaders.com)**







# 9 EXCITING SUMMITS AWAIT YOU – TAILOR YOUR LEARNING!

## Leadership Summit

- Discover how to create a culture of “internal employee mobility” and retain your best leaders who drive growth.
- Apply the a Momentum Mindset® framework—a proven system that empowers you to move from constant reaction to proactive, confident leadership in your credit union.
- Create digital partnerships and give your CU a competitive advantage to acquire more members & loans.

## Lending Summit

- Take home the proven tactics to achieve 6.5% loan growth – more than twice the industry average.
- See how one CU earns a return after losses and expenses of 11.50% on non-prime loans.
- Find out how the most innovative CUs are using AI to drive loan growth & create new opportunities.

## Fintech Summit

- Get a blueprint for building meaningful partnerships that drive growth and innovation.
- Discover how CUs are using the newest apps to gain a competitive edge – and deliver bottom-line results.
- Find out how to reach new market segments using Fintech.

## Trending Summit

- Find out how one of the most successful CUs uses a “triple-win approach” for managing M&As.
- Learn how to guard against cyber threats and leverage critical security controls with tested backups & Recovery Time Objectives.
- Craft a succession plan that supports your CU’s 5-year strategy & complies with NCUA’s newest regs.

## Human Resources Summit

- Discover how to create more happiness in your CU and boost more creativity, problem-solving and bottom-line performance.
- Get the most effective strategies to recruit and retain your top talent.
- Build a high-trust, member-centric culture to drive meaningful and lasting change.

## Marketing & Branding Summit

- Learn how one CU is appealing to new market segments by serving members during life’s darker moments.
- Take home a proven playbook for capturing attention and creating campaigns that deliver killer results.
- Apply a digital first approach to marketing and double or even triple your ROI.



## Financial Summit

- Learn where inflation, interest rates, unemployment & consumer spending are heading in the next 12-18 months.
- Get the strategies you need for unprecedented economic times.
- Discover the tactics the most innovative CFOs are using to manage their balance sheets.

## Growth Summit

- Get solutions every CU needs to successfully reach the “unreachable” -- Gen Z and Millennials.
- Grow membership and deposits in a hyper-competitive market.
- Target niche-oriented markets that have gone largely unnoticed by Big Banks.

## AI Summit

- See how CUs are leveraging AI to engage members – and drive profitable returns.
- Find out how top performing CUs are using AI to drive operational efficiency and reduce costs.
- Get the same AI tools others use to streamline workflows with limited staff.

“Great event, great bonding time, and really great material.”

**Daniel Sowers, CEO of Gulf Wind Credit Union**







# GUEST EXPERIENCES

Registered Guests can choose 1 of 2 experiences offered:



## Arts District Food Tour



Think you know Las Vegas? Think again.

The Arts District Food Tour dishes out three unique adventures that take you beyond the tourist traps. Explore secret eats and must-try bites along the iconic Strip, Downtown, and inside the funky Arts District. Time to taste all Vegas has to offer!



## Paint and Sip



Paint the town red... or any colour you want! Enjoy a lively, laughter-filled afternoon where you'll create your own masterpiece, no experience necessary and all supplies provided!

Guided by professional artists, you'll sip, laugh, and surprise yourself with what you can create when inspiration strikes.

## GUEST EXPERIENCE PACKAGE INCLUDES:

- One admittance to either the Arts District Food Tour OR Paint and Sip
- One admittance to internationally renowned mentalist Frederic Da Silva!
- All conference continental breakfast (not including Breakfast of Champions).
- Access to ALL refreshments, plated luncheons and dessert socials.





## It's time to indulge and treat yourself while learning and networking at the 48th 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.

### Hotel bookings are now open!



**Phone reservations:**  
1.866.227.5944



**Reservation Contact:**  
Lynn Taggart | [ltaggart@flamingolasvegas.com](mailto:ltaggart@flamingolasvegas.com)



**LEADERSHIP** CONVENTION **DISCOVER. EXPERIENCE. GROW.**  
AUGUST 12-15 2025, CAESARS PALACE  
*Las Vegas*

[CULeaders.com](http://CULeaders.com)





## Caesars Palace Las Vegas, 3655 Las Vegas Blvd S, Las Vegas, NV 89109, 866-227-5944



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

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

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 4:00pm. 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.

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").





# MIND-BLOWING ENTERTAINMENT:

## Award-Winning Mentalist Frederic Da Silva

Get ready for an afternoon of astonishing mind reading, mesmerizing illusions, and pure wonder as we bring world-renowned mentalist Frederic Da Silva to the CU Leadership Convention 2025!

Voted Best Mentalist in Europe and celebrated as the #1 Magic Show in Las Vegas, Frederic Da Silva has captivated audiences around the world with his jaw-dropping mental magic, elegant humor, and undeniable charm. His hit show, PARANORMAL, blends mystery, hypnosis, and mind reading, leaving even the most skeptical guests speechless.

Imagine him predicting what's in your pocket, stopping a watch at the exact time you visualize, or revealing the name of the person you're secretly thinking about. Is it an illusion? A special power? Or something beyond explanation? The only thing you'll know for sure is that you'll never forget this performance.

All attendees and registered guests are invited to the opening night entertainment.





# SPONSORS & EXHIBITORS

The ALL-NEW 48th CU Leadership Convention will be **BIGGER, BETTER & BOLDER** than ever with more innovative & thought-provoking speakers . more world-class entertainment ... and more practical guidance uniquely designed to solve your toughest challenges & inspire you to achieve more



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

- 1 → Showcase your company's solutions to solve credit union challenges
- 2 → Generate highly-qualified decision-maker leads through unique branding opportunities
- 3 → Boost your firm's presence at the industry's most top-rated, well-attended convention
- 4 → Ensure your solution becomes a valuable asset in credit unions nationwide
- 5 → Close the deal by networking with key decision-makers & Chairman of the Board

**1 OUT OF 12**  
CREDIT UNIONS IN ATTENDANCE

**60+ SPEAKERS**  
SHARING BEST-PRACTISES  
AND PRACTICAL SOLUTIONS

**1,400 CU EXECS**  
& KEY DECISION-MAKERS

**67%** C-SUITE  
EXECS/VPS

For more information contact Jimmy Kurtovic:



[jimmy.k@culeaders.com](mailto:jimmy.k@culeaders.com)



(646) 356-4504



EARLY BIRD ENDS FRIDAY 27TH JUNE | REGISTER TODAY: [CULEADERS.COM](https://culeaders.com)



CEO REGISTRATION | SAVE UP TO \$225

~~Full Price \$745~~ | Early Bird **\$520**

30%  
OFF!

GENERAL DELEGATE REGISTRATION | SAVE UP TO \$340!

~~Full Price \$1,695~~ | Early Bird **\$1,355**

20%  
OFF!

#### SPECIAL GROUP PRICING FOR DELEGATES

Save per attendee with our group discounts!

Contact our Customer Service Team at 646-795-3261 ext 832 for more information.

Guest Registration

**\$745**

Pre-Conference  
Workshop Registration  
(additional registration required)

**\$425**

CEO Forum

(additional registration required)

**\$225**

#### QUESTIONS?

Customer service team available M-F

9:00am - 5:00pm Eastern | [646-795-3261](tel:646-795-3261) ext 832

#### ✓ YES! SIGN US UP FOR THE 48<sup>TH</sup> 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, 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.

#### 100% Money-Back Guarantee

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 1, 2025, 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.



- Leadership Summit
- Growth Summit
- Trending Summit
- HR Summit
- FinTech
- Branding Summit
- Lending Summit
- Financial Summit
- AI Summit

TUESDAY, 12 <sup>TH</sup> OF AUGUST	
Registration	10:00am
Pre-Conference Workshop: Deep-Dive Hot Topic Workshop #1: Pete Duffy, Managing Director of Merger Advisory Services, SRM <b>M &amp; A - Strategic Considerations for Member Focused CUs</b>	1:00 - 4:00pm
Pre-Conference Workshop: Deep-Dive Hot Topic Workshop #2: John Janclaes, President & CEO, Nymbus CUSO <b>Staying on Strategy: Applying Your Strategic Plan into Your Operations and Culture</b>	1:00 - 4:00pm
Pre-Conference Workshop: Deep-Dive Hot Topic Workshop #3: Tim Harrington, President, TEAM Resources <b>Governance: Leadership Strategies for Directors in a New Era of Banking</b>	1:00 - 4:00pm

WEDNESDAY, 13 <sup>TH</sup> OF AUGUST	
Registration	7:00 - 5:00pm
Exhibit Hall Grand Opening & Continental Breakfast	7:00 - 8:45am
<b>Opening Keynote</b> Joe Theismann, NFL Legend <b>Keynote Presentation: The Challenge of Change</b>	9:00 - 9:45am
Hot Topics Roundtable Panel Geoff Bacino, Partner, Bacino & Associates; Jason Stverak, Chief Advocacy Officer, Defense Credit Union Council <b>Are We Living in Perilous Times? Tax-Exemption Status, Regulatory Changes &amp; Industry Outlook</b>	9:45 - 10:30am
5 x 5 Samuel Jones, PhD, Founder, Transform Now, Inc.; Tim Harrington; Matt Maguy and Jim Pond, JXM; Renee Sattiewhite, President & CEO, AACUC <b>5 speakers share their one best strategy that will have the biggest impact on CUs in just 5 minutes or less</b>	10:30 - 11:00pm
Networking Break in Exhibit Hall	11:00 - 11:45am
Lunch	11:45 - 12:45pm
Networking/Dessert in Exhibit Hall	12:45 - 1:15pm
Leadership Summit	1:15 - 1:40pm
Marketing & Branding Summit Matt Maguy and Jim Pond <b>Open a Can of Whoop Ads: Practical Steps to Grab Attention &amp; Deliver a Killer ROI</b>	1:15 - 1:40pm
FinTech Summit	1:15 - 1:40pm
Lending Summit	1:15 - 1:40pm
HR Summit	1:15 - 1:40pm
Trending Summit Paul Dionne, Chief Strategy Officer & Lead Consultant, Quantum Governance, L3C, <b>Succession Planning: How to Craft a Plan that Supports Your CU's 5-Year Strategy</b>	1:15 - 1:40pm
Growth Summit	1:15 - 1:40pm
Transitional Break	1:40 - 1:50pm
Leadership Summit Tim Harrington <b>Fintech Partnerships -- How CUs Can Gain a Competitive Advantage to Acquire More Members &amp; More Loans</b>	1:50 - 2:20pm
Marketing & Branding Summit Andrew Downin, CEO, O Bee CU <b>What makes your CU Unapologetically Unique?</b>	1:50 - 2:20pm



CONVENTION SCHEDULE

AUG 12-15, 2025, CAESAR'S PALACE, LAS VEGAS

FinTech Summit Nick Evens, President & CEO, CurqI Collective <b>Fintech Partnerships: A Blueprint for Credit Union Success</b>	1:50 - 2:20pm
Lending Summit Maria Matinez, President & CEO, Border FCU; President & CEO, River City FCU <b>Go small to go BIG! How CUs are growing loan portfolios with niche marketing</b>	1:50 - 2:20pm
HR Summit Tamra Gaines, Founder, Tamra Gaines & Associates <b>Top Strategies for Effective Succession Planning in the C-Suite</b>	1:50 - 2:20pm
Trending Summit John Iannarelli, Founder, FBI John <b>Top Cybersecurity Challenges Facing CUs Today &amp; How to Respond</b>	1:50 - 2:20pm
Growth Summit Pete Duffy, Managing Director of Merger Advisory Services, SRM; Mark Lovewell, EVP & CFO California CU; Jared Freeman, President/CEO, OnPath CU <b>M&amp;A Panel Discussion: A No-Holds Barred Conversation about the Good, the Bad and the Ugly</b>	1:50 - 2:20pm
Transitional Break	2:20 - 2:30pm
Leadership Summit Samuel Jones, PhD <b>Momentum Now: A Proven System to Lead with Confidence in Your Credit Union</b>	2:30 - 3:00pm
Marketing & Branding Summit Brandon Michaels, President & CEO, OneAZ Cu <b>Shifting to a New Value Proposition to Drive Your CU Forward</b>	2:30 - 3:00pm
FinTech Summit	2:30 - 3:00pm
Lending Summit Armand Parvazi, Strategic Advisor, CU Collaborate <b>Leveraging Data Analytics to Grow Your Loan Portfolio</b>	2:30 - 3:00pm
HR Summit Sandra McDowell, Founder, eLeadership Academy <b>The Neuroscience of Trust &amp; How CUs Can Empower their Employees</b>	2:30 - 3:00pm
Trending Summit Lynn Heckler, Chief Culture Officer, Bluepact Strategy Group <b>Building a High-Trust, Member-Centric Culture</b>	2:30 - 3:00pm
Growth Summit Bill Butler, CEO of Kachinga; Deena Otto, Officer/SVP, Stanford FCU <b>Reaching the “Unreachable”: How to Grow by Appealing to Millennials and Gen Z’ers</b>	2:30 - 3:00pm
Happy Hour in Exhibit Hall	3:00 - 4:00pm
Opening Night Entertainment with Award Winning Mentalist Frederic Da Silva	7:30 - 8:30pm (Doors open 7:00pm)

THURSDAY, 14 <sup>TH</sup> OF AUGUST		
Breakfast of Champions Idea Exchange (Available to first 200 registrants)		7:30 - 8:45am
Exhibit Hall Open		7:30 - 9:00am
Opening Day Keynote Janelle Shane, AI Speaker & Humorist <b>What AI Can Do -- and Can't</b>		9:00 - 9:40am
Keynote James Pogue, PhD, CEO, JP Enterprises <b>The Connection Quotient: Elevating the Industry Experts to A Leadership Powerhouse</b>		9:40 - 10:20am
Neoteric Changemaker Award Dennis Sullivan, Convention Chairman; Renee Sattiewhite, President & CEO, AACUC <b>2025 Neoteric Changemaker Award Ceremony</b>		10:20 - 10:30am
Transitional Break		10:30 - 10:45am



Leadership Summit Teresa Freeborn, President (ret.), Kinecta FCU and author of Suits and Skirts - Game On! The Battle for Corporate Power <b>Suits and Skirts – Game On!</b>	10:45 - 11:15am
Marketing & Branding Summit	10:45 - 11:15am
AI Summit	10:45 - 11:15am
Lending Summit	10:45 - 11:15am
HR Summit Brian Waldron, President & CEO, Dort FCU <b>Employee engagement: Your secret weapon to give your CU a competitive advantage</b>	10:45 - 11:15am
Trending Summit Dan Stoltz, CEO, Blaze CU <b>The Triple Win: A People-First Approach to CU Mergers</b>	10:45 - 11:15am
Tech Demo	10:45 - 11:15am
CU Connect	10:45 - 12:30pm
CEO Forum Vishal Madhavan, Managing Director & Partner, Boston Consulting Group <b>CEO Forum: AI in Action - Unlocking Efficiency, Innovation &amp; Growth for Credit Unions</b>	10:45 - 12:30pm
Networking Break in Exhibit Hall	11:15 - 11:45am
Leadership Summit Danielle Scodellaro, Sr. Executive Benefits Specialist, TruStage <b>How Internal Talent Mobility Creates Long-Term Leadership Excellence</b>	11:45 - 12:30pm
Marketing & Branding Summit Tansley Stearns, President & CEO, Community Financial CU <b>Marketing your CU in the Joyful and Dark Moments in Your Members’ Lives</b>	11:45 - 12:30pm
AI Summit Mitch Rutledge, Co-Founder and CEO, Vertice AI <b>From Buzz to Benefit: A Practical Path to AI for Credit Union Leaders</b>	11:45 - 12:30pm
Lending Summit Tyler Valentine, President & CEO, StagePoint FCU <b>Bridging Gaps: Empowering Communities with Non-Prime Auto Lending Solutions</b>	11:45 - 12:30pm
HR Summit Val Mindak, President & CEO, Park City CU <b>Succession Planning: Best Practices for Building Leaderss and Developing Engagement Among Employees</b>	11:45 - 12:30pm
Trending Summit Heath Renfrow, Co-Founder & Chief Information Security Officer <b>Latest Threat Actor Trends &amp; Your Most Important Security Control</b>	11:45 - 12:30pm
Financial Summit	11:45 - 12:30pm
CEO Forum Vishal Madhavan, Managing Director & Partner, Boston Consulting Group <b>CEO Forum: AI in Action - Unlocking Efficiency, Innovation &amp; Growth for Credit Unions (cont)</b>	10:45 - 12:30pm
Luncheon	12:30 - 1:15pm
Guest Experience - Art District Food Tour	12:30 - 4:00pm
Guest Experience - Paint & Sip	1:00 - 3:30pm
Networking Break in Exhibit Hall, Exhibit Hall Finale	1:15 - 1:45pm
Leadership Summit John Janclaes <b>The Parternship Advantage: How Strategic Partnerships Can Revitalize Your CU</b>	1:45 - 2:15pm
Marketing & Branding Summit Steph Sherrodd, President & CEO, Sunward CU <b>Re-branding: Effective Practices to Reinvent Your CU in a Dynamic Market</b>	1:45 - 2:15pm
AI Summit	1:45 - 2:15pm
HR Summit Jackson Kerchis, Co-founder & Partner, Happiness Means Business <b>The Serious Business of Happiness: Proven Principles for High Performance</b>	1:45 - 2:15pm



Lending Summit	1:45 - 2:15pm
Trending Summit Brian Lee, President & CEO, Arizona Central CU <b>Catering to Niche Markets: How One CU Serves Members and Families with Dementia</b>	1:45 - 2:15pm
Financial Summit	1:45 - 2:15pm
CU Connect	1:45 - 3:00pm
Transitional Break	2:15 - 2:30pm
Leadership Summit Harold Roundtree, President & CEO, UNCLE CU, Chung Bothwell, Board Chair, UNCLE CU; Susan Mitchell (moderator), CEO, Mitchell Stankovic & Associates <b>Best Practices for Effective CEO - Board Relationships</b>	2:30 - 3:00pm
Marketing & Branding Summit Dohnia Dorman, CEO & Co-founder, Omnia Exec, LLC <b>Break Free from Collaboration Chaos: Reimagine Strategically-Aligned Teamwork for Marketing Success</b>	2:30 - 3:00pm
AI Summit	2:30 - 3:00pm
Lending Summit	2:30 - 3:00pm
HR Summit Rob Hoyle <b>From Managers to Leaders: Enhancing Employee Experience Through Technology</b>	2:30 - 3:00pm
Trending Summit Jim Morrell, President & CEO, Penninsula Community CU <b>Growth By Focusing on Community: Real World Tactics Every CU Should Know</b>	2:30 - 3:00pm
Financial Summit John Moreno, Managing Partner, Newcleus <b>Why you should only pay for performance... and what exactly is “performance?”</b>	2:30 - 3:00pm
After-party	TBD

FRIDAY, 15 <sup>TH</sup> OF AUGUST		
Buffet Breakfast		7:30 - 9:00am
Brandi Stankovic (moderator), Principal, Strategic Advisory, Moderator; Michael Maxwell, Chair, Rize CU; Lisa Arthur, Global Chief Marketing Officer, Sensedia; Scott Prior, CEO, Connection CU <b>Underground: What Makes You Want to CUSS? AI, Growth, Tech, People</b>		9:00 - 9:45am
2-minute spotlight Jackson Kerchis, Tansley Stearns, Brandi Stankovic, Sandra McDowell <b>4 Speakers Have Just 2 Minutes to Deliver their Most Powerful Idea for CUs Today</b>		9:45 - 10:00am
General Session w/ Closing Keynote Milton Hunt <b>Resilience in Times of Uncertainty</b>		10:00 - 11:00am



## SPEAKERS



**ANDREW DOWNIN**  
CEO, O Bee CU

What makes your CU  
Unapologetically Unique



**ARMAND PARVAZI**  
Strategic Advisor, CU Collaborate

Leveraging Data Analytics to Grow Your  
Loan Portfolio



**BILL BUTLER**  
CEO, Kachinga

Reaching the “Unreachable”:  
How to Grow by Appealing  
to Millennials and Gen Z’ers



**BRANDI STANKOVIC**  
Principal, Strategic Advisory

2-Minute Spotlight: 4 Speakers Have  
Just 2 Minutes to Deliver their Most  
Powerful Idea for CUs Today



**BRANDON MICHAELS**  
President & CEO, OneAZ Cu  
  
Shifting to a New Value Proposition to Drive  
Your CU Forward



**BRIAN LEE**  
President & CEO, Landings CU  
  
Catering to Niche Marketings: How One CU  
Serves Members and Families with Diemntia



**CHUNG BOTHWELL**  
Chair, UNCLCE CU  
  
Best Practices for Effective CEO  
- Board Relationships



**DAN STOLTZ**  
CEO, Blaze CU  
  
The Triple Win: A People-First Approach  
to CU Mergers



**DANIELLE SCODELLARO**  
Sr. Executive Benefits  
Specialist, TruStage  
  
How Internal Talent Mobility Creates  
Long-Term Leadership Excellence



**DEENA OTTO**  
Ops Officer, SVP / Stanford FCU

Reaching the “Unreachable”: How to Grow  
by Appealing to Millennials and Gen Z’ers



**DOHNIA DORMAN**  
CEO & Co-founder, Omnia Exec, LLC

Break Free from Collaboration Chaos:  
Reimagine Strategically-Aligned Teamwork



**DR SAMUEL JONES**  
Founder, Transform Now, Inc.  
  
5 Speakers share their one best strategy  
that will have the biggest impact on CUs



**GEOFF BACINO**  
Partner, Bacino & Associates  
  
Are We Living in Perilous Times?  
Tax-Exemption Status, Regulatory  
Changes & Industry Outlook



**HAROLD ROUNDTREE**  
CEO, UNCLE CU  
  
Best Practices for Effective CEO  
- Board Relationships



**HEATH RENFROW**  
Co-Founder & Chief Info Security Officer  
  
Latest Threat Actor Trends & Your Most  
Important Security Control



**JACKSON KERCHIS**  
Co-founder & Partner,  
Happiness Means Business  
  
The Serious Business of Happiness:  
Proven Principles for High Performance



**JARED FREEMAN**  
President/CEO, OnPath CU  
  
M&A Panel Discussion: A No-Holds Barred  
Conversation about the Good, the Bad and  
the Ugly



**JASON STVERAK**  
Chief Advocacy Officer, Defense Credit  
Union Council  
  
Are We Living in Perilous Times?  
Tax-Exemption Status, Regulatory  
Changes & Industry Outlook



## SPEAKERS

**JIM MORRELL**

President &amp; CEO, Peninsula Community CU

Growth by Focusing on Community: Real World Tactics Every CU Should Know

**JOHN IANNERELLI**

Founder, FBI John

Top Cybersecurity Challenges Facing CUs Today &amp; How to Respond

**JOHN JANCLAES**

President &amp; CEO, Nymbus CUSO.

Staying on Strategy: Applying Your Strategic Plan into Your Operations and Culture

**JOHN MORENO**

Managing Partner, Newcleus

Why you should only pay for performance... and what exactly is "performance?"

**LISA ARTHUR**

Global Chief Marketing Officer, Sensedia

Underground: What Makes You Want to CUSS? AI, Growth, Tech, People

**LYNN HECKLER**

Chief Culture Officer, Bluepact Strategy Group

Building a High-Trust, Member-Centric Culture

**MARIA KELL**

Kelmore &amp; Associates, LLC

What's Your Philosophy About Executive Benefits?

**MARIA MARTINEZ**

President &amp; CEO, Border FCU

Go small to go BIG! How CUs are growing loan portfolios with niche marketing

**MARK LOVEWELL**

EVP &amp; CFO, California CU

M&amp;A Panel Discussion: A No-Holds Barred Conversation about the Good, the Bad and the Ugly

**MATT MAGUY AND JIM POND**

JXM

5 speakers share their one best strategy that will have the biggest impact on CUs in just 5 minutes or less

**MICHAEL MAXWELL**

Chair, Rize CU

Underground: What Makes You Want to CUSS? AI, Growth, Tech, People

**MILTON HUNT**

Founder, MiltonHunt.net

Resilience in Times of Uncertainty

**MITCH RUTLEDGE**

Co-Founder and CEO, Vertice AI

From Buzz to Benefit: A Practical Path to AI for Credit Union Leaders

**NICK EVENS**

President &amp; CEO, Curql Collective

FinTech Partnerships: A Blueprint for Credit Union Success

**PAUL DIONNE**

CSO &amp; Lead Consultant, L3C

Succession Planning: How to Craft a Plan that Supports Your CU's 5-Year Strategy

**PETE DUFFY**

Managing Director of Merger Advisory Services, SRM Corp

M &amp; A - Strategic Considerations for Member Focused CUs

**RENEE SATTIEWHITE**

President &amp; CEO, AACUC

5 speakers share their one best strategy that will have the biggest impact on CUs in just 5 minutes or less

**ROB HOYLE**

Senior VP of HR, Vantage West CU

Leveraging Tech to Turn Managers into Leaders



# SPEAKERS

**SANDRA MCDOWELL**

Founder, eLeadership Academy

The Neuroscience of Trust & CUs Can Empower their Employees

**SCOTT PRIOR**

CEO

Connection CU... Underground: What Makes You Want to CUSS? AI, Growth, Tech, People

**STEPH SHERRODD**

President & CEO, Sunward CU

Re-Branding: Effective Practices to Reinvent Your CU in A Dynamic Market

**SUSAN MITCHELL**

President, Mitchell Stankovic & Associates

Underground Collision: Does the Future of Credit Unions Makes You Want to CUSS!

**TAMRA GAINES**

Founder, Tamra Gaines & Associates

Top Strategies for Effective Succession Planing in the C-Suite

**TANSLEY STEARNS**

President & CEO, Community Financial CU

Marketing Your CU in the Joyful and Dark Moments in Your Members' Lives

**TERESA FREEBORN**

President (ret.), Kinecta FCU and author of Suits and Skirts - Game On! The Battle for Corporate Power

Suits and Skirts – Game On!

**TIM HARRINGTON**

President, TEAM Resources

Leadership: Best Practices for CU Directors

**TYLER MOORE**

Kelmore & Associates, LLC

What's Your Philosophy About Executive Benefits?

**TYLER VALENTINE**

President & CEO, StagePoint FCU

Bridging Gaps: Empowering Communities with Non-Prime Auto Lending Solutions

**VAL MINDAK**

President & CEO, Park City CU

Succession Planning: Best Practices for Building Leaders and Developing Engagement Among Employees

**VISHAL-MADHAVEN**

Managing Director & Partner, Boston Consulting Group

CEO Forum: AI in Action - Unlocking Efficiency, Innovation & Growth for Credit Unions



# THANK YOU TO OUR SPONSORS

## AND EXHIBITORS FOR THEIR CONTINUED SUPPORT

### PRINCIPAL SPONSOR

KASASA

### LEAD SPONSOR



### SPONSORS

Bankjoy



THE  
MEMBER CLOSING  
CENTER

TruStage

### EXHIBITORS

Acumen  
FINANCIAL ADVANTAGE

American  
Solutions for Business



AVANA  
CUSO

AVANNIS

BlastPoint  
Discover the humans in your data.

CORNERSTONE  
RESOURCES



CU EVOLUTION

ECG EARNEST  
CONSULTING GROUP

Econocheck

eCU  
TECHNOLOGY  
ONLINE ACCOUNT OPENING & LOAN ORIGINATI  
Fast. Powerful. Flexible.

elan  
Credit Card



Gallagher Re

INLIGHTEN

invo

Lucky Soap

MSC Security

myCU mortgage

OpenLending  
Less Risk. More Reward.

STAYWOOD  
DESIGN

STUKENT

THE  
SHEETER GROUP

TMC  
Total Merchant Concepts, Inc.

velera