



# LEADERSHIP

CONVENTION

JULY 30-AUG. 2, 2024 CAESARS PALACE

**DISCOVER.  
EXPERIENCE.  
GROW.**

*Las Vegas*



Keynote Address with  
Olympic Great,  
**Jackie Joyner-Kersey**

**WEDNESDAY,  
JULY 31, 2024**

9:00 – 9:45 am

Opening-Night  
Reception Featuring:

**Rita Rudner**

**WEDNESDAY,  
JULY 31, 2024**

7:30 – 8:30 pm



Presented in  
Partnership with



**AACUC**  
AFRICAN-AMERICAN  
CREDIT UNION COALITION



# Connect with Abrigo at the 2024 CU Leadership Conference



## Visit us at booth 1610

Drop your business card off for your chance to win a **\$200 Amazon gift card!**



Abrigo enables more than 2,400 U.S. financial institutions to support their communities through technology and advisory services that grow loans and deposits and optimize risk.

## Join our Session

Thursday, August 1  
11:45 AM - 12:30 PM

*From Data to Decisions: Leveraging AI to Drive Strategy and Plan for Risk at Your Credit Union*



**Justin Crawley**  
Senior Consultant

## Attend our Demo

Thursday, August 1  
10:45 AM - 11:15 AM

Learn how **Abrigo Connect** can help transform raw data from across your institution into insights you need to make better strategic and operational decisions.

## Dear Valued Convention Attendee,

Welcome to the 47th CU Leadership Convention!

We have an exciting event planned for you filled with practical guidance, inspiration, a few laughs, and an opportunity to connect with colleagues and forge new partnerships as we continue to find ways to better serve our credit unions and our communities!

We especially want to welcome members of the African-American Credit Union Coalition and we want to thank the team at AACUC for their partnership to help create a one-of-a-kind event for all CU Leaders!

Here are just a few highlights of what to expect...

- **3 NEW PRE-CONFERENCE WORKSHOPS** on interpreting your CU's financials, governance, and leveraging AI.
- **50+ SOLUTION PROVIDERS** in our expanded Expo Hall.
- An evening of entertainment with 9x Comedian of the Year, **RITA RUDNER!**
- 60+ NEW sessions featuring the country's most innovative CU speakers.
- **THE PETE CREAR LIFETIME ACHIEVEMENT AWARDS LUNCHEON** presented by AACUC!
- Announcement of the **RENÉE SATTIEWHITE NEOTERIC CHANGEMAKER AWARD.**
- **TWO NEW GUEST EXPERIENCES!** Step into the Past with the Mob Museum & Speakeasy Tour or Step into the Surreal at Meow Wolf.

Be sure to stop by the AACUC Welcome Lounge where everyone is invited to network and meet with friends and colleagues. We will close the event with everyone's favorite thought-provoking speaker, Brandi Stankovic!

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



Dennis J. Sullivan  
Conference Chairman



# Greetings Valued Convention Attendees and AACUC Members,

On behalf of the African-American Credit Union Coalition (AACUC), welcome to Las Vegas!

We could not be more excited to have partnered with CU Leadership Convention to deliver another exceptional conference experience at scale for our members and hopefully new members.

For those of you who aren't familiar with our award-winning organization, the mission of the AACUC is to increase diversity and inclusion in the credit union movement. Since 1998, we have delivered this value through top-tier professional development programs, volunteering, authentic networking and community building, and advocacy.

We invite you to get to know us throughout the week...

- **AACUC #DEITuesday Welcome Event** to meet-and-greet AACUC's leadership and members.
- **Showtime at the Caesars: Karaoke and Lip Sync** for an entertaining get-together.
- **Pete Crear Lifetime Achievement Awards Luncheon** to honor living legends within our credit union movement.
- **AACUC Signature Closing Party** for a night of dancing and festivities.
- **AACUC Lounge** to relax and connect with each other.
- **AACUC and Regional Chapter Exhibitor Booths** to learn how to engage with us.
- **#DEI Summit** breakout sessions to gain the latest insights and conversations to drive inclusion in your organization.

On behalf of our Board of Directors, leadership, staff and volunteers, we offer our sincerest appreciation to the CU Leadership Convention leadership and staff, and we sincerely hope that you have a lifechanging experience!



Renée Sattiewhite, CUDE, CDP  
AACUC President/CEO





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**SAVE THE  
DATE!**

**CAESARS  
PALACE**  
LAS VEGAS

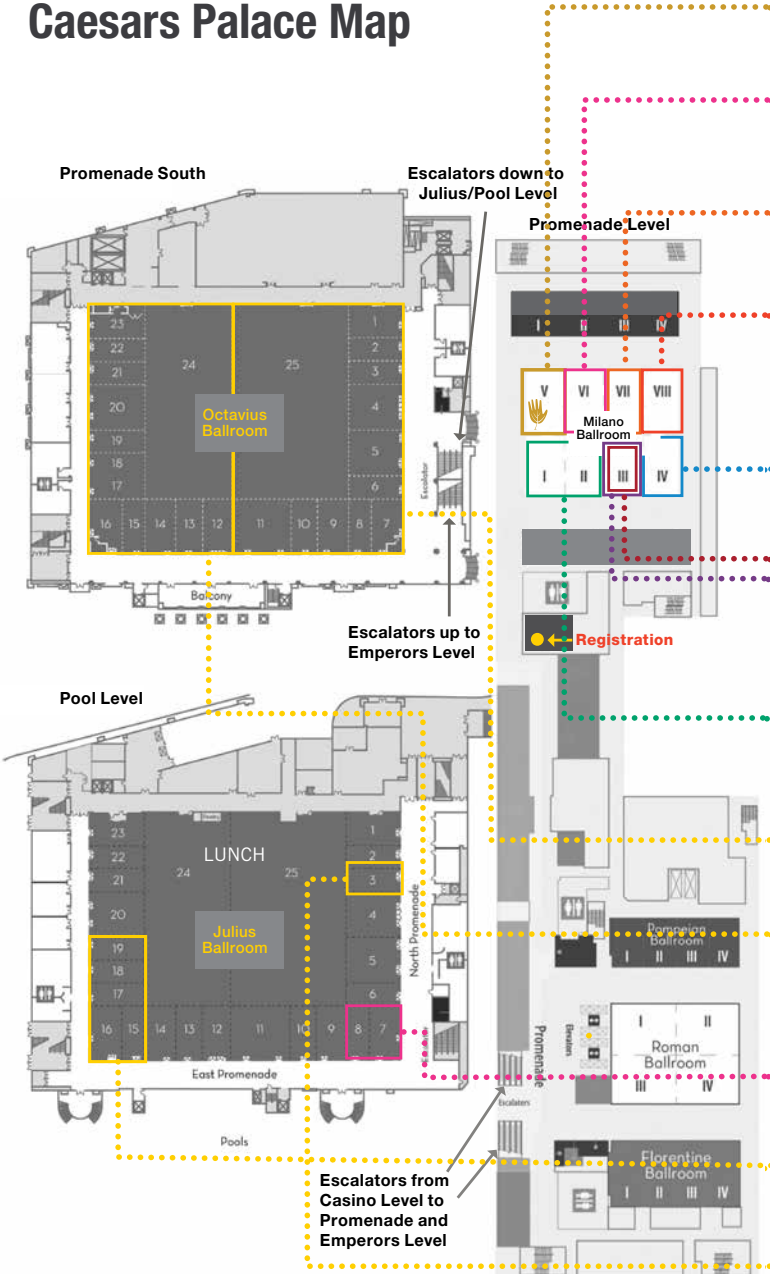
**AUGUST 12-15, 2025**



 **WiFi**

**NETWORK: CAESARS\_RESORTS**

# Caesars Palace Map



ALL ARE

WELCOME

**AACUC LOUNGE**

Milano V

**HUMAN RESOURCES SUMMIT**

Milano 6

**TRENDING SUMMIT**

Milano 7

**FINANCIAL SUMMIT**

Milano 8

**LENDING SUMMIT**

Milano 4

**FINTECH SUMMIT**

**DEI SUMMIT**

Milano 3

**LEADERSHIP SUMMIT**

Milano 1-2

**EXHIBIT HALL**

Octavius 1-11 & 25

**GENERAL SESSION**

Octavius 12-24

**MARKETING & BRANDING**

Julius 7-8

**BREAKFASTS OF CHAMPIONS**

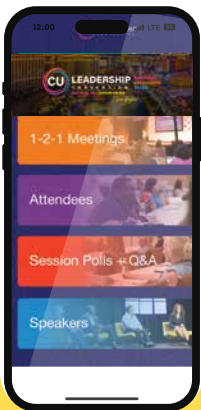
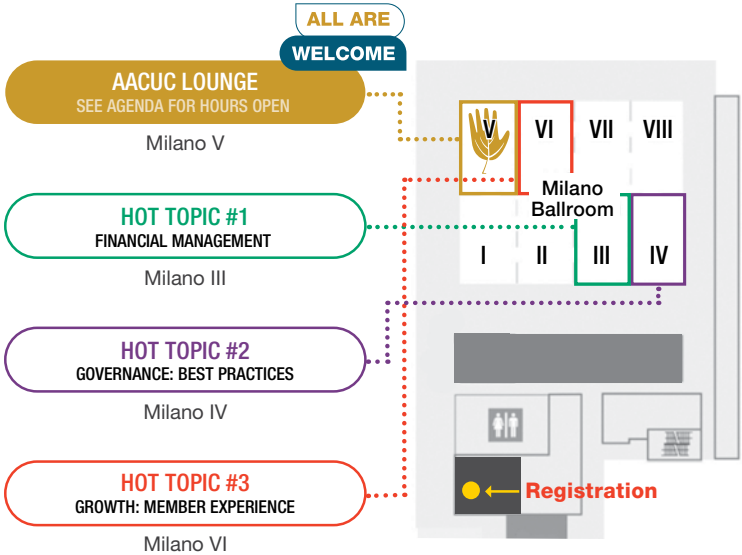
Julius 15-19

**CU CONNECT MEETINGS**

Julius 3

# Caesars Palace Map

## Pre-Conference Workshops



## Mobile App

Stay Connected with CU Leadership App

Download our event app to get the most up-to-date information on the agenda, speakers and more! It's easy!

Search "CU Leadership Convention" in your app store to download the conference app which features the full agenda, speaker information and the opportunity to message other attendees. Refer to the login information email sent to you via email from PEI Media for your login key. Visit us at the registration desk for any questions or assistance.

THURSDAY, AUGUST 1, 2024

# Guest Experience Packages

- 1 pass to Meow Wolf Tour OR Mob Museum & Speakeasy Tour
- One admittance to 9 Time Comedian of Year Winner, Rita Rudner!
- All conference continental breakfasts (not including Breakfast of Champions)
- Access to ALL refreshments, plated luncheons and dessert socials

**GUEST EXPERIENCE PACKAGES ARE LIMITED TO PAID GUESTS.**

1:30 - 5:00 PM

## Mob Museum & Speakeasy Guest Experience

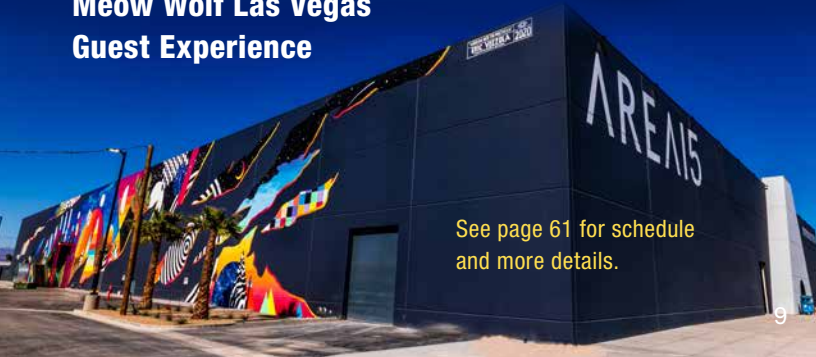
THE MOB MUSEUM



MEOW WOLF

1:30 - 4:30 PM

## Meow Wolf Las Vegas Guest Experience



See page 61 for schedule  
and more details.





# CFS Insight

## INTEGRATION

Third Party Systems

## ANALYTICS

Power BI Analytic Models

## CONSULTING

Collaborative/Power BI



Click to download:

Analyzing Transactions  
for Growth eBook

Enabling Credit Unions to be Data Driven

Stop by booth 1522



# LEADERSHIP CONVENTION

JULY 30-AUG. 2, 2024 CAESARS PALACE

*Las Vegas*

DISCOVER.  
EXPERIENCE.  
GROW.

## THANK YOU TO OUR SPONSORS

### LEAD SPONSORS



### SPONSORS





# A dedicated partner to help you succeed.

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Visa partners with thousands of community financial institutions to help them achieve their goal of driving performance through innovation and service.



**VISA**

TUESDAY,  
JULY 30, 2024

# Pre-Conference

11:00 am - 5:00 pm..... Registration

1:00 - 4:00 pm..... **Pre-Conference Workshops**

1:00 - 4:00 pm

Deep-Dive Hot Topic Workshop #1 – Financial Management: How to Decipher Your Financials Quickly & Confidently **MILANO 3**

**TIM HARRINGTON**, CPA, President, TEAM Resources

1:00 - 4:00 pm

Deep-Dive Hot Topic Workshop #2 – Governance: Best Practices for Directors & Senior Leadership to Make a Quantum Leap for Their Board & Their CU **MILANO 4**

**JENNIE BODEN**, CEO, Quantum Governance, L3C  
**NANCY KAPPLER-FOSTER**, frm. Board Chair, Hudson Valley Credit Union

1:00 - 4:00 pm

Deep-Dive Hot Topic Workshop #3 – Revolutionizing Member Experience By Harnessing the Power of AI and Data **MILANO 6**

**ANNE LEGG**, FOUNDER, THRIVE Strategic Services  
**TROY HALL, PH.D.**, Founder, Cohesion Culture

**ALL ARE**

**WELCOME**

TUESDAY,  
JULY 30, 2024

## #DEITuesday AACUC Welcome Events

3:00 – 4:00 pm

Grand Opening of the AACUC Lounge  
**MILANO V**

Sponsored by Visa

4:00 – 5:00 pm

AACUC Welcome **NEOPOLITAN 1&2**

Sponsored by Trellance

5:00 – 7:00 pm

Showtime at the Caesars:: Karaoke & Lip Sync  
**NEOPOLITAN 1&2**

Sponsored by Trellance

WEDNESDAY,  
JULY 31, 2024

# Day 1

7:00 am – 5:00 pm..... Registration **PROMENADE LEVEL**

7:00 – 8:45 am..... Exhibit Hall Grand Opening & Continental Breakfast

9:00 - 9:40 am      Opening Keynote: A Winning Perspective Gets the Gold: Keynote Address with Olympic Great, Jackie Joyner-Kersey **OCTAVIUS BALLROOM**

**JACKIE JOYNER-KERSEE**, Olympic Great

9:40 - 9:50 am      A “Magical” Interlude **OCTAVIUS BALLROOM**

**NASH FUNG**, Magician & Keynote Speaker

9:50 – 10:30 am      CEO Roundtable Panel: Lessons in Leadership

**RENÉE SATTIEWHITE**, President & CEO, AACUC (mod.)  
**DEBBIE SMITH**, CEO, Georgia United Credit Union  
**DELANA HULING**, President & CEO, Baylor Health Care System CU

10:30 - 11:00 am      5 x 5: 5 Speakers Share Their ONE Best Idea that Will Have the BIGGEST Impact on CUs Today **OCTAVIUS**

**JOHN MORENO**, Partner, Newcleus Credit Union Advisor  
**JOHN JANCLAES**, President & CEO, NYMBUS CUSO  
**KATIE STONE**, CEO & Co-owner, PixelSpoke  
**STAN PHELPS**, Author, Forbes Contributor, TEDx Spkr  
**TYRONE MUSE**, President/CEO, Visions FCU

11:00 - 11:45 am..... Networking Break in Exhibit Hall

11:45 am - 12:45 pm ... **Pete Crear Lifetime Achievement Award Luncheon** **JULIUS**

12:45 - 1:15 pm..... Networking/Dessert in Exhibit Hall

1:15 - 3:00 pm..... **Concurrent Breakouts**



**Winning the Battle for Gen Z**

**CJ KLUMP**, Sr Director, Consumer Credit Products, Visa



**Top 5 AI Strategies Every CMO Must Know to Increase Membership & Retention**

**TOMER BORENSTEIN**, CTO & Co-Founder, BlastPoint





**Go Small to Go Big! How to Capitalize on an Innovative Growth Strategy Serving Niche Markets (session repeats 2:30 - 3:00 pm)**

**JOHN JANCLAES**, President & CEO, NYMBUS CUSO  
**ROB HOYLE**, Chief Information Officer, Vantage West Credit Union



**Navigating Auto Finance Challenges for Near- and Non-Prime Consumers**

**MATT ROE**, Chief Revenue Officer, Open Lending



**Inspire, Empower, Guide Essential Disciplines for TODAY's Leader**

**JIM BOUCHARD**, Founder, The Sensei Leader



**Why, How, What: Preserving Humanity in an AI World**

**GABE KRAJICEK**, CEO, Kasasa



**6 Practical Financial Management Strategies Every CU Should Consider**

**PETER DUFFY**, Managing Director, Piper Sandler

1:40 - 1:50 pm..... Transitional Break

1:50 - 2:20 pm..... **Concurrent Breakouts**



**Recruiting and Retaining Your Highest Performers in the C-Suite**

**JOHN MORENO**, Partner, Newcleus Credit Union Advisors



**Healthy Growth in the Age of Uncertainty**

**KERALA TAYLOR, CUDE**, Co-owner and Director of Marketing & Impact



**Credit Union Fintech Investments: The Good, The Bad, and the Profitable**

**NICK EVENS**, President & CEO, Curql Collective, LLC



**7 Tactics to Increase Your Loan Portfolio and Non-Interest Income (session repeats Thursday, 10:45 - 11:15 am)**

**LATONYA ALLEN**, Chief Lending Officer, Government Printing Office FCU



**HR Strategies for Highly Effective Credit Unions**

**SHARON CAMPER**, Chief People Officer, Apple FCU



**Strategies to Leverage Banking Data and AI to Deepen Member Relations**

**TOM TOBIN**, Founder & CEO, Modelshop



**Repositioning the Deposit Strategy**

**BILLY GUTHRIE**, Managing Dir., Darling Consulting Grp  
**JOE KENNERSON**, Managing Dir., Darling Consulting Grp

2:20 - 2:30 pm..... Transitional Break

2:30 - 3:00 pm..... **Concurrent Breakouts**



**Leadership Principles for High-Performance Boards**

**TIM HARRINGTON**, CPA, President, TEAM Resources



**Disrupting the Credit Union Brand: Fintech Marketing Strategies to Win Back Market Share**

**SAM PLESTER**, CUDE, CEO & Founder, Mission Brands Consulting



**Go Small to Go Big! How to Capitalize on an Innovative Growth Strategy Serving Niche Markets (session repeated from 1:15 - 1:40 pm)**

**JOHN JANCLAES**, President & CEO, NYMBUS CUSO  
**ROB HOYLE**, Chief Information Officer, Vantage West CU



**Potential to Profit: How to Double Auto Loan Profit in Just 12 Months**

**JOHNNY GARLICH**, Founder, The Member Closing Center  
**ERIC FIFIELD**, Chief Revenue Officer, EFG Companies



**Top 5 Methods to Leverage Your Culture to Drive Retention and Engagement**

**LASONYA BERRY**, CEO, McPherson, Berry & Associates



**3 Key Habits of Highly Effective Analytics Programs in CUs Today**

**JASON BEDSWORTH**, President, CFS Insight  
**SCOTT OLSON**, SVP & Chief Data Officer, CoastHills FCU  
**MICHAEL SCHOLL**, Dir. of Data Analytics, Chartway CU

**Going Beyond the M&A Headlines: Lessons Learned From Both Sides of the Deal**

**PETER DUFFY**, Managing Director, Piper Sandler  
**MARYELLEN VALAITIS**, former Director, McGraw-Hill FCU  
**TRAVIS MARKLEY**, CEO, Hoosier Hill CU

3:00 - 4:00 pm..... Happy Hour in the Exhibit Hall with Nash Fung

7:30 - 8:30 pm .... Opening Night Entertainment Rita Rudner  
 (Doors open 7:00pm) **OCTAVIUS BALLROOM**

THURSDAY,  
 AUGUST 1, 2024

# Day 2

7:00 am– 4:00 pm .... AACUC Lounge **MILANO V**

7:30 - 8:45 am..... Breakfast of Champions

7:30 - 9:00 am..... Exhibit Hall Opening & Continental Breakfast

9:00 - 9:40 am Trust and Inspire: The Leadership Solution for a New Era of Work **OCTAVIUS BALLROOM**

**STEPHEN M.R. COVEY**, Bestselling Author & Speaker

9:40 - 10:20 am The Magic of Empathetic Leadership: Communication Techniques to Lead with Empathy **OCTAVIUS BALLROOM**

**NASH FUNG**, Magician & Keynote Speaker

10:20 - 10:30 am..... **2024 Renée Sattiewhite Neoteric Changemaker Award Ceremony** **OCTAVIUS BALLROOM**

10:30 - 10:45 am..... Transitional Break

10:45 - 11:15 am..... **Concurrent Breakouts Resume**

**Curating Executive Benefits for Multicultural Leadership**

**KWAME SMITH**, Executive Benefits Specialist, TruStage

**Competitive Conquesting: How to Find and Eat Your Competitor's Lunch**

**JIM POND**, Co-Founder, James & Matthew, JXM

**DEI Panel: Best Practices to Serve More Members & Create a Better Experience for All**

**ESPY POBLANO** (moderator), Training Manager, AACUC  
**DAYATRA MATTHEWS**, CLO/GC, LGFCU/Civic FCU  
**DEBORAH FEARS**, President/CEO, Chicago POE CU  
**SEDRIC BRINSON**, Chairman and Co-founder of L.E.A.D MS



7 Tactics to Increase Your Loan Portfolio and Non-Interest Income (session repeated from Wednesday, 1:50 - 2:30 pm)

**LATONYA ALLEN**, Chief Lending Officer, Government Printing Office FCU



Resiliency: The Cornerstone of Success in a Rapidly Changing Environment

**MILTON HUNT**, President, MiltonHunt.net



The \$500+ Billion Opportunity: How to Harness Member Travel Spend to Future Proof Your CU

**MAURICE SMITH, ESQ.**, CEO (ret.), Local Government FCU, M Smith Law, PLC

10:45 - 11:15 am

Tech Demo **MILANO 8**

Connecting the Dots: Improving the Management Decision-Making Process with Abrigo Connect

**JUSTIN CRAWLEY**, Senior Advisor, Abrigo

New Fundamentals of Automotive Lending

**MATT ROE**, Chief Revenue Officer, Open Lending

10:45 - 11:15 am

CU Connect: Why Volume is the Greatest of the Big Data V's **JULIUS 3**

**ADAM WRIGHT**, Managing Director, CUDX Operations

10:45 - 12:30

CEO Forum — Practical Leadership Strategies to Unleash Greatness in Others **JULIUS 2**

**STEPHEN M.R. COVEY**, Bestselling Author & Speaker

11:15 - 11:45 am..... Networking Break in Exhibit Hall

11:45 am - 12:30 pm.... **Breakout Sessions**



From Data to Decisions: Leveraging AI to Drive Strategy and Plan for Risk at Your CU

**JUSTIN CRAWLEY**, Senior Advisor, Abrigo



Pink Goldfish: Amplify Differentiation to Stand Out in the Marketplace

**STAN PHELPS**, Author, Forbes Contributor, TEDx Speaker, IBM Futurist



**Allyship Through a DEI Lens – Even When the View Isn’t Always Popular**

**JUAN FERNANDEZ** (mod.), President & CEO, Louisiana CU League  
**JOHN BISSELL**, President & CEO, Greylock FCU  
**BARBARA MOJICA**, Exec. Dir., National Assn. of Latino CUs & Professionals  
**EMMA HAYES**, Chief Learning & Engagement Officer, SECU  
**LEIGH BRADY**, CEO, SECU



**Network Lending: The Future of Cooperative Lending**

**RYAN GIFFIN**, SVP, Client Success, LendKey



**Increasing Human Digital IQ to Harness the Power of Artificial Intelligence**

**ZACH CHRISTENSEN**, Director of Digital Services; Mitchell Stankovic and Associates



**Let’s Beat the Bad Guys! Practical CU Strategies to Protect Your CU and Your Members from Ransomware Attacks**

**JEN ANTHONY**, Vice President, Think/Stack



**Financial Strategies in Uncertain Times**

**TRACEY JACKSON**, Pres./CEO, Treasury Department FCU

12:30 - 1:15 pm..... Luncheon **JULIUS**

1:15- 1:45 pm..... Exhibit Hall Finale

1:30 - 5:00 pm..... Mob Museum & Speakeasy Guest Experience

1:30 - 4:30pm..... Meow Wolf Las Vegas Guest Experience

1:45 - 2:15 pm..... **Concurrent Breakouts Resume**



**Governance Pathways for Strategic Growth**

**LYNETTE SMITH**, Chief Engagement Officer, Quantum Governance & retired President/CEO, TruEnergy FCU



**The Marketing Mosaic for 2025: Credit Union Strategies that Drive Business Results**

**SHAWNA SUCKOW**, Author & Speaker



**Connection and Contribution: How to Make Belonging the Linchpin in Your Strategic Advantage**

**DOHNIA DORMAN**, Chief Experience Officer, African-American Credit Union Coalition





**Recruitment and Retention Strategies for CU Lending Departments**

**PAUL MARSTON**, COO, HR Performance Solutions



**Spy Games: How to Decode Personality Types to Boost Communication**

**KEITH & REBECCA KLEIN SCOTT**, Founders; TALLsmall Productions, LLC



**Cyber Risk: The Greatest Threat to The Credit Union Bottom Line**

**MARQUIS CARROLL**, CEO, MSC Security



**Managing Investments In A Volatile Market: Practical Approaches CUs Can Easily Apply (session repeats at 2:30-3:00pm)**

**EMILY HOLLIS**, CEO, ALM First

1:45 - 2:15 pm ..... **CU Connect Meeting: What's Your Philosophy About Executive Benefits? JULIUS 3**

**MARIA KELL**, Principal, KellMoore & Associates, LLC  
**TYLER MOORE**, Principal, KellMoore & Associates, LLC

2:15 - 2:30 pm..... **Transitional Break**

2:30 - 3:00 pm .... **Concurrent Breakouts Resume**



**Rebuilding Trust: A Journey of Strengthening Board and Executive Relationships**

**LIZ PONDER**, Senior Executive, SRP FCU



**Keys to Building Life-Long Members, Not Rate-Hoppers**

**JULI LEWIS**, VP of Community Engagement, USF Fed. CU  
**JIM LAKE**, Managing Partner, Michael Walters Advertising



**Two Vastly Different Continents – One Shared Mission**

**GEORGE OMBADO**, AADE, I-CUDE, HSC Executive Director/CEO, ACCOSCA  
**RONALDO HARDY**, President and CEO, NACUSO



**Real-World, Practical Tactics to Increase Loan Growth & Member Loyalty**

**KEITH & REBECCA KLEIN SCOTT**, Founders; TALLsmall Productions, LLC;  
**JOHN FELTON**, CEO, Southern Chautauqua Federal CU



The Leadership Pipeline: Creating a System for Developing Tomorrow's Leaders in Your CU

TAMRA GAINES, President, Tamra Gaines & Associates



Data Analytics: Your CU's Secret Power for Creating Member Value

ANNE LEGG, Founder, THRIVE Strategic Services  
TAD CARLSON, VP – IT Solutions & Development, Royal CU



Managing Investments In A Volatile Market: Practical Approaches CUs Can Easily Apply (session repeated from 1:45-2:15pm)

EMILY HOLLIS, CEO, ALM First

7:00 pm – 10:00 pm .... AACUC Signature Closing Party  
NEOPOLITAN 1&2

FRIDAY,  
AUGUST 2, 2024

# Day 3

7:00 am– 12:00 pm .... AACUC Lounge MILANO V

7:30 - 9:00 am .... Buffet Breakfast EXHIBIT HALL

9:00 - 9:50 am Underground Collision: Generative AI - Who's Gonna Tell Your Story? OCTAVIUS BALLROOM

SUSAN MITCHELL, CEO, Mitchell, Stankovic & Ass.  
RAJ BANDARU, CIO, Kinecta FCU  
ASHLEY HOLLOWAY, Partner Sales Manager, Amazon  
CORY MADDEN, Board Director, Ventura County CU

9:50 - 10:00 am 2-minute spotlight: 4 Speakers Have Just 2 Minutes to Share One BIG Idea in this Theatrical Presentation OCTAVIUS BALLROOM

JIM BOUCHARD, Founder, The Sensei Leader  
GABE KRAJICEK, CEO, Kasasa  
CAROLYN JORDAN, Chief Growth Officer, Neighborhood CU  
JAMES POGUE, PH.D, CEO, JP Enterprises

10:00 - 10:15 am Putting Thought to Action: Applying Your Best Take-Aways OCTAVIUS BALLROOM

SHAWNA SUCKOW, CSP, Author

10:15 - 11:00 am EI vs AI: 5 Powerful Lessons for CULeaders OCTAVIUS BALLROOM

BRANDI STANKOVIC, ED.D., Host & Producer, The Strategic Hotbox

11:00 am..... ADJORN

# Is Your Credit Union Ready for the Next-Gen Decision Engine?

## Innovative Credit Unions are Choosing Modelshop:



Increase Automated Decision Rates



Personalize your Member Experience



Underwrite Cash Flows using Banking Data



Improve Equity and Generational Inclusion



Download Our Whitepaper: Innovation and Inclusion in Next-Generation AI Credit Risk Models

### AI-Powered Decisions for Lending

*"For over a decade, our clients have used Modelshop's Risk & Credit Decision Engine to make more accurate instant decisions, reduce default and fraud losses, increase straight-through automation, and deliver an uplift in revenue growth."*

# Pre-Conference Workshops

TUESDAY | JULY 30, 2024

1:00 - 4:00 pm

MILANO 3

DEEP-DIVE HOT TOPIC WORKSHOP #1:

## Financial Management: How to Decipher Your Financials Quickly & Confidently

TIM HARRINGTON, CPA, President, TEAM Resources



One of the country's leading experts on CU financial management, Tim Harrington, returns to help directors and C-suite level leaders better interpret the financial statements. It is more critical than ever for all CU leaders to understand the key metrics to help make better and more informed decisions.

Today's economy is unlike what many have seen in recent history. Inflation continues to remain stubbornly high despite interest rates reaching a 20-year high ... unemployment is at a 50-year low ... talk of "recessionary pressures" continue to make headlines ... the wealth gap is widening ... and credit unions are under more pressure to lower costs while adding more services.

Join us in this deep-dive, plain-English workshop as Tim Harrington helps you decode your CU's financials. You will learn:

- The 12 critical ratios that matter most so you can decode them in just seconds!
- Evaluation techniques to determine what each metric means to your CU.
- Real-world benchmarking data to gauge your CU.
- 5 little-known, but very powerful metrics you can use to give your CU an edge.

**TAKE HOME:** Every attendee gets Tim Harrington's Financial De-Coding Manual to take back to your CU to begin deciphering your CU's most important financial figures.

## DEEP-DIVE HOT TOPIC WORKSHOP #2:

## Governance: Best Practices for Directors & Senior Leadership to Make a Quantum Leap for Their Board & Their CU

JENNIE BODEN, CEO, Quantum Governance, L3C

NANCY KAPPLER-FOSTER, frm. Board Chair, Hudson Valley Credit Union



As credit unions evolve and adapt to a changing market, their governance must also evolve. Yet, many boards and senior leadership continue to run with the same meeting structure, the same types of leaders, the same committees, and in the same way they have been for years.



Take a deep dive into how some of the country's leading credit unions are evolving their board governance to solve some of the most difficult challenges

facing credit unions today including:

- **The Right Balance:** Striking a balance between strategic direction and operational oversight to provide meaningful guidance without overstepping its role.
- **The Right People:** Identifying the ideal board of the future and building an effective succession process to obtain it.
- **The Right Structure:** Evolving their board-level committee structure for governance success.

Plus, learn first-hand how Hudson Valley Credit Union overhauled its own governance nominations policies and processes and has become a model for attracting and retaining its Ideal board of the future.



## DEEP-DIVE HOT TOPIC WORKSHOP #3: Revolutionizing Member Experience By Harnessing the Power of AI and Data

**ANNE LEGG**, Founder, THRIVE Strategic Services

**TROY HALL, PH.D.**, Founder, Cohesion Culture



Tired of not seeing growth in driving deeper member engagement? Curious but also concerned about emerging AI Tools? Unable to identify the frictions in the member experience journey to solve them? Wondering how to integrate member engagement objectives into your culture fully?



Join THRIVE Founder Anne Legg and Cohesion Culture Founder Dr. Troy Hall for a dynamic, hands-on, immersive learning experience. They will unpack

the AI landscape to provide an overview of the AI tools and give you a blueprint to cultivate your culture for AI and data consumption. Working in small groups, you will apply these concepts to real-world scenarios and begin crafting an action plan tailored to your organization.

3:00 pm – 7:00 pm

NEOPOLITAN 1&2/MILANO 5

### #DEITuesday AACUC Welcome Events



**ALL ARE  
WELCOME**

All registered conference attendees are invited to participate in AACUC's Welcome Events on #DEITuesday. Kick back and relax in the AACUC Lounge as early as 3:00 p.m. and don't miss a warm welcome from AACUC leadership at 4:00 p.m. Then, end the night with one of the most highly anticipated AACUC signature events, karaoke including lip sync this year!

3:00 pm – 4:00 pm

MILANO V

## Grand Opening of the AACUC Lounge



Be one of the firsts to network and re-connect with friends and colleagues inside the AACUC Lounge. The Lounge is the spot to hang out, connect and recharge.

ALL ARE

WELCOME

SPONSORED BY 

4:00 pm – 5:00 pm

NEOPOLITAN 1&2

## AACUC Welcome



Join AACUC's President/CEO Renée Sattiewhite and team as they kick off #DEITuesday with a Vegas-style greeting and a brief special presentation. Meet and greet with fellow members, Board of Directors and Regional Chapter Officers. Plus, learn more about the organization and our partnership with CU Leadership Convention.

ALL ARE

WELCOME

PRESENTED BY 

5:00 pm – 7:00 pm

NEOPOLITAN 1&2

## Showtime at the Caesars: Karaoke & Lip Sync



Ever dream of performing in Vegas? Here's your chance! Bring your best vocals or whispers for an entertaining evening of karaoke and lip sync!

ALL ARE

WELCOME

PRESENTED BY 

# Day 1

WEDNESDAY | JULY 31, 2024

7:00 am– 4:00 pm

MILANO V

## AACUC Lounge



ALL ARE

WELCOME

Network and re-connect with friends and colleagues inside the AACUC Lounge. The Lounge is the spot to hang out, connect and recharge. All registered conference attendees are welcome.

SPONSORED BY **VISA**

7:00 am – 5:00 pm

PROMENADE LEVEL

## Registration

7:00 – 8:45 am

OCTAVIUS

## Exhibit Hall Grand Opening & Continental Breakfast

9:00 - 9:40 am

OCTAVIUS | GENERAL SESSION

## Opening Keynote: A Winning Perspective Gets the Gold: Keynote Address with Olympic Great, Jackie Joyner-Kersey

**JACKIE JOYNER-KERSEE**, Olympic Great



Named by Sports Illustrated as “The Greatest Female Athlete of the 20th Century,” Jackie Joyner-Kersey will deliver the keynote address to open the 47th CU Leadership Convention.

Join us as she discusses how her relentless pursuit of excellence on and off the track has led her to give back to her community. Coming from very

humble beginnings in East St. Louis, Illinois, Jackie Joyner-Kersey is among the all-time greatest athletes ever to compete in Track & Field. Jackie has won three Olympic Gold Medals, one Olympic Silver Medal, and two Olympic Bronze Medals at four different Olympic Games. Less well known, however, are Jackie’s tireless efforts and remarkable accomplishments off the field as a philanthropist and an advocate for children’s education, health issues (in particular asthma from which she has suffered throughout her life), racial equality, social reform, and women’s rights. Never one to be classified as merely an athlete, Jackie says, “I strive to be a Jackie of all trades.”

9:40 - 9:50 am

OCTAVIUS | GENERAL SESSION

## A “Magical” Interlude

**NASH FUNG**, Magician & Keynote Speaker



9:50 – 10:30 am

OCTAVIUS | GENERAL SESSION

## CEO Roundtable Panel: Lessons in Leadership

**RENÉE SATTIEWHITE**, President & CEO, AACUC (moderator)

**DEBBIE SMITH**, CEO, Georgia United Credit Union

**DELANA HULING**, President & CEO, Baylor Health Care System CU



Leading a credit union today is filled with challenges – and opportunities. Find out how some of the country’s top CEOs

are facing some of the most pressing challenges including the increase in remote working, recruitment and retention in a tight labor market, creating a culture of innovation, serving diverse markets, managing growth and much more. Join us for an open, honest conversation about how CEOs are navigating these challenges, and finding new opportunities to better lead their CUs.

10:30 - 11:00 am

OCTAVIUS | GENERAL SESSION

## 5 x 5: 5 Speakers Share Their ONE Best Idea that Will Have the BIGGEST Impact on CUs Today

**JOHN MORENO**, Partner, Newcleus Credit Union Advisor

**JOHN JANCLAES**, President & CEO, NYMBUS CUSO

**KATIE STONE**, CEO & Co-owner, PixelSpoke

**STAN PHELPS**, Author, Forbes Contributor, TEDx Speaker, IBM Futurist

**TYRONE MUSE**, President/CEO, Visions FCU



11:00 - 11:45 am

OCTAVIUS

## Networking Break in Exhibit Hall

## Pete Crear Lifetime Achievement Awards Luncheon



The African-American Credit Union Coalition’s prestigious biennial award – named after credit union pioneer and WOCCU past president Pete Crear – recognizes a credit union professional or volunteer whose career best embodies the AACUC’s mission to increase the strength of the global credit union community. Join us as we celebrate this year’s honorees.

### Sandra DeVoe Bland

Board Chairman, SRP Federal Credit Union

Sandra DeVoe Bland is the first female and African American Chairman of SRP Federal Credit Union’s Board of Directors, where she has served for 27 years. Her influence has set strategic direction, amplified members’ voices and reinforced SRP’s commitment to its communities.



### Dan Berger

Retired CEO, National Association of Federally-Insured Credit Unions (NAFCU)

Before merging with CUNA to become America’s Credit Unions, Dan Berger’s leadership as NAFCU CEO was instrumental in making NAFCU the premiere advocate for the credit union industry. He has been recognized as one of Washington, D.C.’s top lobbyists for 18 consecutive years.





## Networking/Dessert in Exhibit Hall

1:15 - 1:40 pm

## Concurrent Breakouts

LEADERSHIP SUMMIT

MILANO 1-2

### Winning the Battle for Gen Z

CJ KLUMP, Senior Director, Consumer Credit Products, Visa



Driven by economic events and generational coming of age, US consumers' credit card needs and preferences are evolving. Come learn how Gen Z is different from their predecessors and how your

organizations can attract, engage, and retain Gen Z customers.

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MARKETING &amp; BRANDING SUMMIT

JULIUS 7-9

### Top 5 AI Strategies Every CMO Must Know to Increase Membership & Retention

TOMER BORENSTEIN, CTO &amp; Co-Founder, BlastPoint



Discover the top five AI strategies to attract and retain members at your credit union in a 25-minute session led by BlastPoint's CTO & Co-Founder. Learn how you can personalize member experiences for greater satisfaction,

predict and prevent member churn using AI, deliver optimized product recommendations to boost engagement, and more. Join us to gain actionable insights to help you better predict, understand, and drive member behavior.

SPONSORED BY **BlastPoint**

## FINTECH SUMMIT

MILANO 3

## Go Small to Go Big! How to Capitalize on an Innovative Growth Strategy Serving Niche Markets

**JOHN JANCLAES**, President & CEO, NYMBUS CUSO

**ROB HOYLE**, Chief Information Officer, Vantage West Credit Union



You've heard the expression riches in niches – a new growth strategy in which brands reap huge rewards focusing on small, but profitable target markets. Think university alumni, workers in the gig economy, newly enlisted family members, and small law firms. Each segment has very different needs that might be better served with a new digital financial brand without the time-consuming challenges of creating a new credit union. Find out

how some CUs are creating new all-in-one digital brands to reach new markets, grow market share, and increase their ROA. If you're looking for unique growth strategies, you won't want to miss this session!

**SESSION REPEATS 2:30 - 3:00 PM**

## LENDING SUMMIT

MILANO 4

## Navigating Auto Finance Challenges for Near- and Non-Prime Consumers

**MATT ROE**, Chief Revenue Officer, Open Lending



Steep borrowing costs and inflation-driven high prices make buying a vehicle increasingly difficult for those in the near- and non-prime credit segment. On a macro level, these barriers make it harder for lower-credit consumers to

achieve upward credit mobility, putting the future of the automotive industry at risk. Learn how you can increase ROA, achieve yield targets and serve the underserved without adding extra risk. In this session you will learn:

- How younger generations view vehicle ownership and automotive financing.
- Opportunities to counter consumer distrust in financial institutions and the lending process.
- How to safely expand risk-based lending activity by identifying creditworthy near- and non-prime borrowers.

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HR SUMMIT

MILANO 6

## Inspire, Empower, Guide: Essential Disciplines for TODAY's Leader

**JIM BOUCHARD**, Founder, The Sensei Leader



More than ever, it's not “just about the money” when it comes to attracting and holding on to top talent. People are going where they know their leaders care, where their work has meaning, and they have a real chance to learn, grow and develop.

In this engaging and interactive session, we'll confront today's toughest leadership challenges – head on.

- Attract – and KEEP – the best people in this fast-moving environment
- Cultivate leaders at ALL levels – regardless of title or position. Your front line people are the face of your credit union, and your member's first impression!
- Learn why human-centric leadership is critical in the ever growing world of AI
- Connect people to PURPOSE – not just a job
- Engage people in the face of uncertainty

## TRENDING SUMMIT

MILANO 7

## Why, How, What: Preserving Humanity in an AI World

GABE KRAJICEK, CEO, Kasasa



In a chilling, new report by Citigroup, the banking industry will be the hardest-hit by the deployment of AI, with 54% of roles at risk for AI-led job displacement. AI will indeed change “what” we do as humans, and in many ways, “how” we can improve our roles in the credit union. But the “WHY” that motivates us to do what we do (beyond just a paycheck!) is irreplaceable. The good news is that the “WHY” matters to consumers. Additional research shows most consumers value genuine human empathy and creativity over AI driven emulations. Find out how to keep pace with new technology while also articulating your “WHY” in an increasingly automated world.

SPONSORED BY **KASASA**

## FINANCIAL SUMMIT

MILANO 8

## 6 Practical Financial Management Strategies Every CU Should Consider

PETER DUFFY, Managing Director, Piper Sandler



It's safe to say that CU executives have not experienced an economic environment like we have today. Interest rates remain at a 40-year high, deposit growth is waning, investment income is more challenging than ever, and members seem to want everything cheaper – and faster! CUs may operate as non-profit, but profit is indeed needed to

meet member and staff expectations. Join Pete Duffy as he share 6 considerations for enhancing the bottom line. These are the same tactics already in practice by top performing CUs you can use right away. Find out the steps every CFO should consider when rates and liquidity return to “normal.” Plus, take home 6 practical strategies you can use to better manage your CU’s finances.

1:40 - 1:50 pm

## Transitional Break

1:50 - 2:20 pm

## Concurrent Breakouts Resume

LEADERSHIP SUMMIT

MILANO 1-2

### Recruiting and Retaining Your Highest Performers in the C-Suite

JOHN MORENO, Partner, Newcleus Credit Union Advisors



It is truly a war for talent in the C-suite right now. CUs are competing with larger institutions that can offer better pay packages, more resources, and more attractive opportunities whether it’s with other credit unions, community

banks, FinTechs or other emerging financial services. And once you have someone in place, the challenge is keeping your talent – and not losing them to the competition! Join us for this in-depth session as we discuss the latest trends in recruitment of highly talented individuals and equip you with:

- A key secret to recruiting high-performers.
- Practical strategies to match the expectations of highly-talented individuals with your goals.
- The difference between a truly high performer and average performer (and what it means to you).
- And 4 key secrets to retaining great talent once they are on-board.

## MARKETING &amp; BRANDING SUMMIT

JULIUS 7-9

## Healthy Growth in the Age of Uncertainty

**KERALA TAYLOR, CUDE**, Co-owner and Director of Marketing & Impact



Pursuing a growth-oriented focus in uncertain times is more challenging than ever. Now is the time to focus on the values and cooperative principles that set credit unions apart in the financial industry! This interactive

session is jampacked with examples of innovative, inspiring initiatives other credit unions have embarked on to supercharge their marketing and impact efforts in the midst of ongoing volatility. You'll learn how to lean into your credit union superpowers to:

- Grow your membership and loans
- Increase community impact
- Improve the financial well-being of your membership
- Avoid getting stuck in the reactivity trap

## FINTECH SUMMIT

MILANO 3

## Credit Union Fintech Investments: The Good, The Bad, and the Profitable

**NICK EVENS**, President & CEO, CurqI Collective, LLC



Explore the highs and lows of fintech investments for credit unions. In this session, industry expert Nick Evens will highlight successful investments, common pitfalls, and how to de-risk investments for profitability, relevancy,

and competitiveness. In this session you will learn how to:

- Spot high potential fintech opportunities that align with your credit union's strategic goals and have the potential for high returns.



- Gain insights into the most common mistakes credit unions make when investing in fintech and how to avoid them to protect your assets and reputation.
- Leverage the newest tech to stay competitive and meet the evolving needs of your members.
- Uncover the “Curql Method” for de-risking fintech investments to ensure profitability and sustainability
- Discover emerging trends that could impact your credit union’s investment strategy and overall business model.

## LENDING SUMMIT

MILANO 4

## 7 Tactics to Increase Your Loan Portfolio and Non-Interest Income

**LATONYA ALLEN**, Chief Lending Officer, Government Printing Office FCU



As lending and non-interest income continue to wane at CUs nationwide, some are bucking the trend and experiencing dramatic growth. Find out how to increase your loan portfolio and non-interest income using some of the

same highly-effective lending strategies Latonya Allen uses at GPO FCU that have generated a 17.1% ROI on one loan campaign, a 74% credit card penetration rate and 41% overall loan growth rate during the past 2 years. Whether you are looking to enhance your member loyalty programs, increase auto lending or grow your credit card program, you’ll take home practical strategies you can use right away.

**SESSION REPEATS THURSDAY, 10:45 - 11:15 AM**

## HR SUMMIT

MILANO 6

## HR Strategies for Highly Effective Credit Unions

**SHARON CAMPER**, Chief People Officer, Apple FCU

Discover how Apple FCU, one of the country's largest and most innovative credit unions, is solving some of the movement's toughest challenges today including: talent acquisition, leadership development and employee engagement. Learn how the CU is following a 3-year HR strategy to help measure its effectiveness, improve management performance, develop talent, and get an inside look at how the CU plans to re-scale and up-scale staffing as AI changes the workplace. Plus, find out how Apple FCU is retaining 95% of its management with its leadership development program and how it has managed to keep its overall turnover rate under 15%. Take home real-world HR strategies that you can use in your own CU.

## TRENDING SUMMIT

MILANO 7

## Strategies to Leverage Banking Data and AI to Deepen Member Relations

**TOM TOBIN**, Founder & CEO, Modelshop

AI is allowing credit unions to make better credit decisions, improve efficiency, personalize loan offers, increase retention, and decrease costs without having to employ data scientists and coders to make it all happen. What once took months can be done in days. Find out how the most forward-thinking credit unions are employing banking

data and the newest AI technology to better serve members, increase member retention and improve back-end and front-end operations. Get the tools and strategies you need to take advantage of the latest data sources and newest AI solutions that you can begin to employ quickly and easily.

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FINANCIAL SUMMIT

MILANO 8

## Repositioning the Deposit Strategy

**BILLY GUTHRIE**, Managing Director, Darling Consulting Group

**JOE KENNERSON**, Managing Director, Darling Consulting Group



The market has spoken, and the Fed has signaled a pivot. At least for now. The recent bond market rally and expected Fed cuts mean that the peak in deposit competition for this cycle is likely behind us. Now the question is,



what lies ahead on the other side? The yield curve remains inverted and margin pressure is not going away in the short run. In fact, deposit rates lag on the way down just as they do on the way up. What will be your plan? Join

Darling Consulting Group as they explore the 2024 deposit strategy outlook.

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2:20 - 2:30 pm

## Transition Break

2:30 - 3:00 pm

## Concurrent Breakouts Resume

## LEADERSHIP SUMMIT

MILANO 1-2

## Leadership Principles for High-Performance Boards

**TIM HARRINGTON**, CPA, President, TEAM Resources



Quick Quiz: What is your board's purpose? Is it to oversee the safety & soundness of the credit union? Or, is the purpose to push the CU forward to success and relevancy in an uncertain future? It's a trick question; the answer

is both. But most boards either ignore or are unaware of the second answer. Those that choose the easy path and don't force themselves into the unknown – and simply work to maintain the status quo in a familiar and predictable market – risk losing their members and often struggle just to survive. Discover how high-performance boards are transforming their CUs by moving beyond their “safety and soundness” focus and becoming collaborators with management to create the preferred brand and a successful future for the credit union.

## MARKETING &amp; BRANDING SUMMIT

JULIUS 7-9

## Disrupting the Credit Union Brand: Fintech Marketing Strategies to Win Back Market Share

**SAM PLESTER**, CUDE, CEO & Founder, Mission Brands Consulting



With neobanks and fintech staking an ever-greater claim on consumer wallets, is the onus now on credit unions to disrupt the market? Explore some of the most successful brand and marketing strategies employed by

emerging and established fintech, and how that playbook can be adapted to help credit unions win with consumers who just want everything faster, cheaper and on-demand.

## Go Small to Go Big! How to Capitalize on an Innovative Growth Strategy Serving Niche Markets

**JOHN JANCLAES**, President & CEO, NYMBUS CUSO

**ROB HOYLE**, Chief Information Officer, Vantage West Credit Union



You've heard the expression riches in niches – a new growth strategy in which brands reap huge rewards focusing on small, but profitable target markets. Think university alumni, workers in the gig economy, newly



enlisted family members, and small law firms. Each segment has very different needs that might be better served with a new digital financial brand without the time-consuming challenges of creating a new credit union. Find out

how some CUs are creating new all-in-one digital brands to reach new markets, grow market share, and increase their ROA. If you're looking for unique growth strategies, you won't want to miss this session!

**SESSION REPEATED FROM 1:15 - 1:40 PM**

## Potential to Profit: How to Double Auto Loan Profit in Just 12 Months

**JOHNNY GARLICH**, Founder, The Member Closing Center

**ERIC FIFIELD**, Chief Revenue Officer, EFG Companies



Over the past decades, CU direct loan loyalty has halved, with 75% of members now using the dealer channel for auto loans. Join us for an interactive session demonstrating a novel strategy to put CUs back in control of their



members' auto loans, boosting profit per loan by 35%-40%. Learn how creatively structuring loans can save members thousands in ownership costs and provide the car ownership experience they hope for. Enjoy this entertaining presentation where speakers use crowd feedback to reveal how to double direct loan revenue, and make direct loans the launchpad for growing profitable member relationships in 2024.

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THE  
MEMBER CLOSING  
CENTER

HR SUMMIT

MILANO 6

## Top 5 Methods to Leverage Your Culture to Drive Retention and Engagement

**LASONYA BERRY**, CHRO, AACUC / CEO, McPherson, Berry & Associates



Deloitte's research shows 94% of executives and 88% of employees believe a distinct workplace culture is important to organizational success. Today's evolving workplace dynamics has ensured that leaders focus on their culture to maintain competitiveness. Employees are well informed about how they want to work and are not shy about their needs. In this session, leaders will hear the top five strategies to refine and leverage their culture to achieve their business goals while also retaining their top talent. Discover the same methods other CUs are using to increase retention and boost engagement by 30%.

## 3 Key Habits of Highly Effective Analytics Programs in CUs Today

**JASON BEDSWORTH**, President, CFS Insight

**SCOTT OLSON**, SVP & Chief Data Officer, CoastHills FCU

**MICHAEL SCHOLL**, Director of Data Analytics, Chartway CU



The most effective analytics programs in credit unions are built on 3 key habits: (1) Creating a culture of data-driven decision-making; (2) Building a learning environment around analytics and, (3) Focusing attention on just 5 critical metrics that drive your credit union. Join this panel discussion as some of the credit union movement's leading analytics executives share how they are applying these 3 key habits to better serve their operations and their members. Take home the same strategies that have grown membership by over 35% through data driven marketing, eliminated thousands of hours of repetitive / manual reporting and saved millions of dollars in losses from fraud. This session is designed for all management levels and data/analytic team members.

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## Going Beyond the M&A Headlines: Lessons Learned From Both Sides of the Deal

**PETER DUFFY**, Managing Director, Piper Sandler

**MARYELLEN VALAITIS**, former Director, McGraw-Hill FCU

**TRAVIS MARKLEY**, CEO, Hoosier Hill CU



The fastest path to growth is through either a merger or acquisition. But not all M&As are successful. Get a behind the scenes look from both sides of the deal to learn why an M&A might work for you ... how to assess potential partners for a merger or acquisition ... what to consider when evaluating key deal points and pricing ... how to properly conduct due diligence ... and best practices for communicating with all stakeholders to keep your key people engaged. Join us for a no-holds barred discussion to learn how one deal succeeded, and another fell apart at the 11th hour. Don't miss it. This is one everyone will be talking about.

3:00 - 4:00 pm

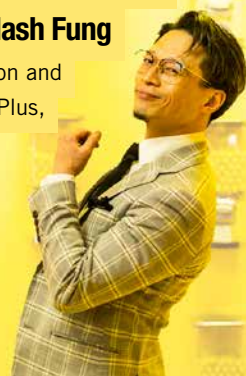
## Happy Hour in the Exhibit Hall with Nash Fung

Relax and unwind after a full day of inspiration and guidance at Happy Hour in the Exhibit Hall. Plus, enjoy some "street magic" with Magician Nash Fung!

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TruStage™



## Opening Night Entertainment Rita Rudner

Opening Night Comedy with Rita Rudner is only open to registered attendees, guests and vendors. Must have your badge to enter.

A house-filling favorite in Las Vegas since she opened as one of the hottest tickets in town in June 2000, Rudner is known for her epigrammatic one-liners. Over the course of a multi-year run she sold almost two million tickets, grossed over a hundred million dollars and become the longest-running solo female comedy show in the history of Las Vegas. She was named Las Vegas's Comedian of The Year nine years in a row and in 2006 received The Nevada Ballet's Woman Of The Year Award. In October 2017 she was given the Casino Entertainment Legend Award.

Rita's first solo HBO special, Rita Rudner's One Night Stand, was nominated for several awards, as was her eponymous English BBC television show that later appeared in the USA on A&E. Rudner's two one-hour specials for HBO, Born to Be Mild and Married Without Children, were ratings standouts and she performed all over the country..

Rita  
Rudner

DRINK SERVICE HOSTED BY:



# Be Part of Something Greater

Join the nearly 2,000 members and more than 750 credit unions, leagues, associations, and financial services organizations as we increase inclusion in the credit union industry.

## Top 5 Reasons to Join AACUC

1. Grow your network with diverse, like-minded professionals!
2. Up-skill and gain competencies with industry leading trainings!
3. Build your talent pipeline with AACUC Connect Job Postings!
4. Increase supplier diversity with trusted AACUC Strategic Partners!
5. Commit to change by advocating for financial inclusion!



[www.aacuc.org](http://www.aacuc.org)

# Day 2

THURSDAY | AUGUST 1, 2024

7:00 am– 4:00 pm

MILANO V

## AACUC Lounge



ALL ARE

WELCOME

Network and re-connect with friends and colleagues inside the AACUC Lounge. The Lounge is the spot to hang out, connect and recharge. All registered conference attendees are welcome.

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7:30 - 8:45 am

JULIUS

## Breakfast of Champions

Come prepared to share with your peers ONE idea that worked in your CU, and enjoy a delicious breakfast to begin the day! All attendees have been asked to RSVP to ensure availability.

7:30 - 9:00 am

OCTAVIUS | GENERAL SESSION

## Exhibit Hall Grand Opening & Continental Breakfast

9:00 - 9:40 am

OCTAVIUS | GENERAL SESSION

## Trust and Inspire: The Leadership Solution for a New Era of Work

STEPHEN M.R. COVEY, Bestselling Author & Speaker



Trust & Inspire is a new way of leading that starts with the belief that people are creative, collaborative, and full of potential. People with this kind of leader are inspired to become the best version of themselves and to produce

their best work. People don't want to be managed; they want

to be led. Discover how to lead effectively, drive incredible performance, and put into practice the fundamental beliefs of a Trust & Inspire Leader.

Plus, ALL CEOS are invited to special workshop with with New York Times and #1 Wall Street Journal bestselling author, Stephen M.R. Covey as he shows step-by-step how to boldly apply a Trust & Inspire leadership style.

9:40 - 10:20 am

OCTAVIUS | GENERAL SESSION

## The Magic of Empathetic Leadership: Communication Techniques to Lead with Empathy

**NASH FUNG**, Magician & Keynote Speaker



By day, Nash Fung is a keynote speaker & magician but as night falls, he is a crisis line volunteer. This unique journey taught him many meaningful lessons on creativity, empathy, and human connections. Discover practical

empathetic techniques you can use to:

- Create better solutions for some of your toughest challenges with your team.
- Develop deeper trust and increase employee retention.
- Ensure your colleagues feel heard, understood and valued.
- Implement a golden rule in crisis situations every leader can use to support their people.

Be prepared to take away innovative techniques and inspiration ... all with a touch of magic.

10:20 - 10:30 am

OCTAVIUS | GENERAL SESSION

## 2024 Renée Sattiewhite Neoteric Changemaker Award Ceremony

10:30 - 10:45 am

## Transition Break

## Concurrent Breakouts

LEADERSHIP SUMMIT

MILANO 1-2

### Curating Executive Benefits for Multicultural Leadership

**KWAME SMITH**, Executive Benefits Specialist, TruStage



This presentation explores an often-overlooked method for accelerating diversity in the C-suite: evolving executive compensation strategy to meet the needs of a multicultural workforce. An overview on the brief state of the industry, credit union leadership statistics, and DEI-centered challenges, leads into a discussion on five contemporary executive mindsets that are emerging as the C-suite becomes more diverse. The session concludes with a set of empathetic questions leaders can ask of their sitting and successive executives to reach greater parity with their expectations.

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MARKETING &amp; BRANDING SUMMIT

JULIUS 7-9

### Competitive Conquesting: How to Find and Eat Your Competitor's Lunch

**JIM POND**, Co-Founder, James & Matthew, JXM



This workshop is designed to equip credit union leaders with ultra-effective strategies for reaching potential members who are currently exploring or have already engaged with rival financial institutions. Participants will gain insights into how to harness competitive intelligence to its fullest, with a deep dive into how cutting-edge tactics like



precise geofencing, device ID retrospection, and automatic content recognition (ACR) are driving astonishing outcomes.

CU marketers will discover how these incredibly potent new promotional techniques and cutting-edge marketing technology tools are revolutionizing the landscape of digital marketing engagement. Take home:

- Strategies for reaching individuals who receive marketing from competing CUs
- Methods to engage with prospects who have previously conducted transactions with rivals
- Tactics to capture the attention of prospects exposed to ads from other financial institutions
- Advanced geofencing strategies to target prospects who have visited the physical branches of competing CUs
- Tips to construct custom member segments based on online activities related to competitors

DEI SUMMIT

MILANO 3

## DEI Panel: Best Practices to Serve More Members & Create a Better Experience for All

**ESPY POBLANO** (moderator), Training Manager, AACUC

**DAYATRA MATTHEWS**, CLO/GC, LGFCU/Civic FCU

**DEBORAH FEARS**, President/CEO, Chicago POE CU

**SEDRIC BRINSON**, Chairman and Co-founder of L.E.A.D MS



For CUs to grow, they must serve more diverse markets that make everyone feel welcome. The question is how best to go about creating an effective DEI culture both internally and externally? Discover how some of the country's most innovative CUs are effectively managing their DEI strategies

with member programs designed to serve all members, unique supplier diversity initiatives, regular reviews to determine what's working and what needs improvement, and much more.

PRESENTED IN PARTNERSHIP WITH



LENDING SUMMIT

MILANO 4

## 7 Tactics to Increase Your Loan Portfolio and Non-Interest Income

**LATONYA ALLEN**, Chief Lending Officer, Government Printing Office FCU



As lending and non-interest income continue to wane at CUs nationwide, some are bucking the trend and experiencing dramatic growth. Find out how to increase your loan portfolio and non-interest income using some of the same highly-effective lending strategies Latonya Allen uses at GPO FCU that have generated a 17.1% ROI on one loan campaign, a 74% credit card penetration rate and 41% overall loan growth rate during the past 2 years. Whether you are looking to enhance your member loyalty programs, increase auto lending or grow your credit card program, you'll take home practical strategies you can use right away.

(SESSION REPEATED FROM WEDNESDAY, 1:50 - 2:30 PM)

HR SUMMIT

MILANO 6

## Resiliency: The Cornerstone of Success in a Rapidly Changing Environment

**MILTON HUNT**, President, MiltonHunt.net



Grab a seat early for this one as Milton Hunt, one of the most popular speakers from 2023, returns to help you overcome stress and challenging circumstances whether you are working on the frontlines, in the office, the

boardroom or from home. Resiliency is a necessary skill for CU leaders that can be improved over time with the right toolset. When someone is resilient, they are able to respond to change in an effective and positive manner. Milton will give you the tools you need to overcome the roller coaster of change ... identify the characteristics to adapt in uncertain times ... develop resilience in yourself ... and support its development in others. Milton is an edu-tainer, a motivator and an energizer. This is one everyone will be talking about!

## TRENDING SUMMIT

MILANO 7

## The \$500+ Billion Opportunity: How to Harness Member Travel Spend to Future Proof Your CU

**MAURICE SMITH, ESQ.**, CEO (ret.), Local Government FCU,  
M Smith Law, PLC



Credit union members spend an estimated \$500+ billion per year on travel. Most credit unions are missing this opportunity and losing market share to banks who meet their travel needs. It's time for your credit union to

take a stand! Learn how to harness your members' spend and develop a tailored travel strategy proven to enhance member engagement, deposits, market share, and your bottom line.

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**CREDIT UNION  
TRAVEL**

## Connecting the Dots: Improving the Management Decision-Making Process with Abrigo Connect

**JUSTIN CRAWLEY**, Senior Advisor, Abrigo



Join us for an engaging demonstration of Abrigo Connect, a cutting-edge analytics tool designed to enhance decision-making capabilities across credit unions. This session will explore how Abrigo Connect leverages artificial intelligence, natural language search, and advanced analytics to transform raw data into actionable insights that empower credit union leaders.

SPONSORED BY  **abrigo**<sup>™</sup>

## New Fundamentals of Automotive Lending

**MATT ROE**, Chief Revenue Officer, Open Lending



The recent changes in automotive retailing and lending technology are driving new fundamentals in automotive lending. This session will shed light on fundamentals that auto lenders should consider in their operations.

SPONSORED BY  **OpenLending**

## Why Volume is the Greatest of the Big Data V's

ADAM WRIGHT, Managing Director, CUDX Operations



When it comes to big data, credit unions have pursued the three V's—volume, velocity and variety—with equal effort. The rise of AI is changing this dynamic. In today's battle for big-data budget, volume is inching slightly ahead of its velocity and variety of competitors.

That's because AI is ravenous for data—big data. The bigger, the better.

When credit unions expand the volume of data that fuels their analytics, they will finally be able to deliver the personalized, predictive experiences today's members expect.

In this session, CUDX's Adam Wright will explore what can happen when credit unions feed into and share access to a rich, anonymized and analytically valuable data set.

SPONSORED BY  **Trellance**

## CEO Forum — Practical Leadership Strategies to Unleash Greatness in Others

STEPHEN M.R. COVEY, Bestselling Author & Speaker



**Please Note: This CEO Forum requires a separate registration.**

Find out how truly great leaders unleash greatness in others – and how you can too each day in your credit union. You will learn how to apply the 3 stewardships of a Trust & Inspire leader by applying a practical and actionable framework that includes:

- Modeling: Who you are
- Trusting: How you lead
- Inspiring: Connect to why

Stephen brings with him decades of leadership experience as the former President & CEO of the Covey Leadership Center, founded by his late father and author of the seminal leadership book, 7 Habits of Highly Effective People. As head of the Covey Leader Center, Stephen M.R. Covey nearly doubled revenues, increased profits by 12 times, and boosted shareholder value by 67 times as the company grew to become the largest leadership development firm in the world.

A Harvard MBA, Stephen co-founded and currently leads FranklinCovey's Global Speed of Trust Practice. He is a highly sought-after international speaker who has taught trust and leadership in 57 countries to business, government, military, education, healthcare, and NGO entities.

11:15 - 11:45 am

OCTAVIUS

## Networking Break in Exhibit Hall

11:45 am - 12:30 pm

## Concurrent Breakouts Resume

LEADERSHIP SUMMIT

MILANO 1-2

### From Data to Decisions: Leveraging AI to Drive Strategy and Plan for Risk at Your CU

JUSTIN CRAWLEY, Senior Advisor, Abrigo



Are you curious about AI and how it could be the key to unlocking your credit union's full potential?

In this session, credit union executives will learn how to harness the power of AI by taking raw data and transforming it into actionable insights for strategic planning and risk mitigation. Whether it's identifying growth opportunities,

understanding employee efficiency, and anticipating future risks, integrating AI into your institution's reporting and dashboarding will be imperative in this ever-changing financial landscape.

Join us to discover innovative approaches to visualizing data, enabling more effective board reporting and streamlined decision-making.

SPONSORED BY  **abrigo™**

MARKETING & BRANDING SUMMIT

JULIUS 7-9

## **Pink Goldfish: Amplify Differentiation to Stand Out in the Marketplace**

**STAN PHELPS**, Author, Forbes Contributor, TEDx Speaker, IBM Futurist



True differentiation in banking is rare. CUs need solutions to stand out and not just settle in a sea of sameness. This session features an unconventional eight-part F.L.A.W.S.O.M.E. framework for

achieving competitive separation.

As a result of this session, you will take away:

- **Tools:** Get equipped with how to uncover weakness and weirdness in their DNA.
- **Skills:** Understand how to design in order to amplify uniqueness.
- **Empathy:** Gain a deeper appreciation for the need to exceed customer expectations.



## Allyship Through a DEI Lens – Even When the View Isn't Always Popular

**JUAN FERNANDEZ** (moderator), President & CEO, Louisiana CU League

**JOHN BISSELL**, President & CEO, Greylock FCU

**BARBARA MOJICA**, Exec. Dir., National Assn. of Latino CUs & Pro.

**EMMA HAYES**, Chief Learning & Engagement Officer, SECU

**LEIGH BRADY**, CEO, SECU



Let's face it. For many, DEI is suddenly taboo. Elon Musk recently posted, "DEI must DIE." It is more challenging than ever to have discussions about DEI practices, and it can be even more challenging for allies to step up and support change amid a growing backlash. Join us for an open, honest discussion about how CU leaders can be an advocate for others ... how to strike a balance between serving members and protecting employees ... when to stand by someone and when to speak up ... how to move past the acronym and create equal access for all, inside and outside the walls of the CU ... and how to ensure open financial access to everyone in your community.

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## Network Lending: The Future of Cooperative Lending

**RYAN GIFFIN**, SVP, Client Success, LendKey



Today credit unions face unprecedented challenges and opportunities. Traditional lending models are being disrupted by technological advancements and changing consumer preferences, necessitating innovative solutions. This presentation explores network lending, a cooperative model where financial institutions pool resources, agree on common underwriting and pricing standards, and optimize liquidity management by collectively originating, buying, and selling loans. Through insightful case studies and practical strategies, attendees will gain a comprehensive understanding of how network lending can facilitate access to broader lending opportunities, improve risk management, streamline processes, and enhance competitiveness. You get the same strategies used by other CUs that have gained access to a younger demographic (average of 28 years old), borrowers with average FICOs of 750 and average income of \$130,000, and improved liquidity management. Don't miss this opportunity to learn about the transformative potential of network lending and how it can drive growth, efficiency, and member satisfaction.

## Increasing Human Digital IQ to Harness the Power of Artificial Intelligence

**ZACH CHRISTENSEN**, Director of Digital Services; Mitchell Stankovic and Associates



AI will not replace jobs; your organization will choose to replace jobs. This session discusses the importance of increasing Digital IQ across all levels of your organization, from Board Members to Member

Service Representatives (MSRs), ensuring that everyone is equipped to thrive in this new era of work. Join us to explore actionable strategies for leveraging AI within your credit union. Understand how to foster a culture of continuous learning and digital literacy, enabling your team to effectively utilize AI technologies. Gain insights into real-world applications of AI that can streamline operations, improve member services, and drive strategic and operational decision-making. Don't let your credit union be left behind – join us to increase your Human Digital IQ and leverage AI to your benefit.

## Let's Beat the Bad Guys! Practical CU Strategies to Protect Your CU and Your Members from Ransomware Attacks

**JEN ANTHONY**, Vice President, Think/Stack



The most recent attack that crippled more than 60 credit unions showed just how vulnerable many CUs are to ransomware attacks. Find out how to arm yourself before an attack and respond in the “fog of war” so you

11:45 am - 12:30 pm

Concurrent Breakouts (continued)

never have to pay a dime – and resume operations safely and soundly within hours, not weeks. Discover the 4 practical strategies from prevention to response every CU must follow whether you are managing your cybersecurity in-house or through a third-party vendor. Plus, take home the lessons learned from the most recent attacks to ensure your CU and your members' data is protected.

FINANCIAL SUMMIT

MILANO 8

## Financial Strategies in Uncertain Times

**TRACEY JACKSON**, President/CEO, Treasury Department FCU



As we navigate this uncertain economic environment, it's crucial to stay informed and prepared. In this interactive session, insights and strategies will be shared that can help you manage risks, identify

opportunities, and make informed decisions to safeguard and grow your credit union. You will get practical, actionable advice that you can implement immediately to enhance financial resilience.

12:30 - 1:15 pm

JULIUS

## Luncheon

1:15- 1:45 pm

OCTAVIUS

## Exhibit Hall Finale

1:30 - 5:00 pm

## Mob Museum & Speakeasy Guest Experience

- 1:30pm:** Meet at Convention Registration Desk
- 1:45pm:** Transportation to the Mob Museum
- 2:00pm** Mob Museum & Distillery Tour and Speakeasy Visit
- 4:15pm:** Depart and Return to Caesars
- 5:00pm:** Arrive Back at the Hotel



Step into the past with a visit to the Mob Museum in Las Vegas. Uncover the fascinating stories of organized crime that built Las Vegas as we know it. Take a guided tour of the museum and it's exhibits. Explore the distillery to learn about the art of moonshine production and enjoy a taste of this historic spirit. Be sure you know the password to stop by the speakeasy, where we will relax and savor a crafted cocktail in an authentic Prohibition-era setting. The Mob Museum offers an immersive journey into a captivating chapter of American history!

1:30 - 4:30pm

## Meow Wolf Las Vegas Guest Experience

- 1:30 pm:** Meet at Convention Registration Desk
- 1:45 pm:** Transportation to MeowWolf
- 2:00 pm:** Self Guided Tour of MeowWolf's Omega Mart
- 3:30 pm:** Cocktails at Area 15
- 4:15pm:** Depart and Return to Caesars
- 5:00pm:** Arrive Back at the Hotel



Join us for an \*out-of-this-world\* experience at Meow Wolf in Las Vegas, where art and adventure blend into an immersive interactive experience. Explore a wild, colorful world filled with mind-bending installations, secret passageways, and interactive exhibits that ignite your imagination and curiosity. After you explore this mesmerizing labyrinth, stop by Area 15 to enjoy a cocktail. Meow Wolf is an adventure around every turn, an experience you will never forget!

## Concurrent Breakouts Resume

LEADERSHIP SUMMIT

MILANO 1-2

### Governance Pathways for Strategic Growth

**LYNETTE SMITH**, Chief Engagement Officer, Quantum Governance & retired President/CEO, TruEnergy FCU



Where are credit unions heading? And how can governance help your credit union get there? Learn why governance evolution should be a part of your strategic plan and how to prepare for asset growth. Just as your credit union operations must evolve to meet new technology and marketplace demands, so too must your governance become more sophisticated to mirror that evolution. Lynette will share ideas that just may spark a strategic growth discussion at your next board meeting.

MARKETING & BRANDING SUMMIT

JULIUS 7-9

### The Marketing Mosaic for 2025: Credit Union Strategies that Drive Business Results

**SHAWNA SUCKOW**, Author & Speaker



The velocity of change has never been so challenging. Prospects are evolving rapidly, the economy is driving new issues, and the country's trust crisis creates a marketing challenge...or huge opportunity depending on your strategy. How do you stand out to prospects in a crowded market when they pay less attention? Repetitive messaging no longer works, and prospects no longer trust traditional advertising. To appeal to today's evolving prospects, we must apply new strategies that capture attention, help us stand out from the Sea of Sameness, and drive them to take action.

Join marketing and consumer behavior expert, Shawna Suckow, in this engaging session as she shares the latest economic and consumer trends underway, and predictions for 2025. Don't worry, it's not a boring lecture! She'll share her Marketing Mosaic strategy that will help you drive new business in the year ahead. Find out how to create impactful and memorable Marketing regardless of budget or staff size...truly stand out to help you attract more business...and get the template that will help you easily plan your marketing mix going forward.

DEI SUMMIT

MILANO 3

## Connection and Contribution: How to Make Belonging the Linchpin in Your Strategic Advantage

**DOHNIA DORMAN**, Chief Experience Officer, African-American Credit Union Coalition



Belonging – a fundamental human need and the sense of being accepted and included by others – is essential to any DEI strategy. That's because just making employees feel comfortable at work isn't enough to get the job done.

Organizations must foster a sense of belonging for team members to be connected to purpose, to bring their best contributions to the workplace and ultimately to drive organizational performance. In this session, we'll unpack the costs and benefits of prioritizing a culture of belonging and learn how to go beyond the status quo to make belonging a strategic advantage for your organization.

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## LENDING SUMMIT

MILANO 4

## Recruitment and Retention Strategies for CU Lending Departments

**PAUL MARSTON**, COO, HR Performance Solutions



Join us for an insightful engagement tailored specifically for credit union professionals focused on enhancing their lending departments. This session will discuss effective recruitment techniques that attract top-tier talent and talent management retention

strategies designed to keep your team motivated and engaged. Learn best practices, innovative approaches, and practical solutions to build a dynamic lending department that drives member satisfaction and organizational growth. Don't miss this opportunity to transform your approach to staffing and management in the competitive financial services landscape.

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## HR SUMMIT

MILANO 6

## Spy Games: How to Decode Personality Types to Boost Communication

**KEITH & REBECCA KLEIN SCOTT**, Founders; TALLsmall Productions, LLC



Get ready to crack some codes. Find out how to quickly and easily identify personality types that often shift depending on the circumstances, mood, and even time of day. Whether you're in the boardroom, the C-suite, coaching

employees, or meeting with members, you can use the intel gained to improve your communication, understand others and get the desired results faster and without the drama. Join Keith & Rebecca for a fun, entertaining and eye-opening presentation with practical tips anyone can use anytime, anywhere.

## Cyber Risk: The Greatest Threat to The Credit Union Bottom Line

**MARQUIS CARROLL**, Chief Executive Officer, MSC Security



This session will provide a comprehensive overview of the current cyber threat landscape, including emerging threats and vulnerabilities unique to the financial sector. Attendees will gain valuable knowledge on best practices for implementing robust cybersecurity measures, from securing online banking platforms to protecting against sophisticated phishing attacks, customer data and ransomware. Marquis Carroll, a seasoned cybersecurity professional with extensive experience in the financial sector, will share real-world examples and actionable advice to help you fortify your credit union's defenses.

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## Managing Investments In A Volatile Market: Practical Approaches CUs Can Easily Apply

**EMILY HOLLIS**, CEO, ALM First



As net income margins continue to tighten, CUs are looking for alternative income streams to manage the balance sheet. In this session, ALM expert Emily Hollis discusses the fixed investments allowable under NCUA and some states and which sectors perform best in a highly anticipated falling rate market. For those seeking enhanced yield, she also reveals various options through the Employee Benefits Pre-Fund and Charitable Donation accounts. You won't want to miss her top investments to avoid! Plus, be among the first to learn about a new fund with AACUC that everyone will be talking about.

(SESSION REPEATS 2:30 - 3:00 PM)

## CU Connect Meeting: What's Your Philosophy About Executive Benefits?

**MARIA KELL**, Principal, KellMoore & Associates, LLC

**TYLER MOORE**, Principal, KellMoore & Associates, LLC



(Invitation only please)

The session title is not a rhetorical question! This session will address the need for a meaningful Executive Benefits philosophy, what should be considered, and how to implement and document the process.



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2:15 - 2:30 pm

## Transitional Break

2:30 - 3:00 pm

## Concurrent Breakouts Resume

LEADERSHIP SUMMIT

MILANO 1-2

## Rebuilding Trust: A Journey of Strengthening Board and Executive Relationships

**LIZ PONDER**, Senior Executive, SRP FCU



Join Senior Executive Liz Ponder as she recounts one of the most challenging periods of her career. In this compelling narrative, Liz shares her journey of rediscovering and rebuilding trust between an Executive Team and their

Board of Directors. Be inspired by her candid reflections and the valuable lessons she learned, which resonate with many credit union Executives and Boards today.

## Keys to Building Life-Long Members, Not Rate-Hoppers

**JULI LEWIS**, VP of Community Engagement, USF Federal Credit Union

**JIM LAKE**, Managing Partner, Michael Walters Advertising



In an era where members often chase the best rates, building lasting relationships is key to credit union success. This session explores proven strategies to foster loyalty and engagement among members, moving beyond transactional interactions. We will delve into effective communication techniques and innovative differentiators that resonate beyond financial incentives. Join us to discover how to transform your credit union into a community hub, where

members stay not just for great rates, but for the invaluable connections and long-term partnerships you create.

## Two Vastly Different Continents – One Shared Mission

**GEORGE OMBADO**, AADE, I-CUDE, HSC Executive Director/CEO, ACCOSCA

**RONALDO HARDY**, President and CEO, NACUSO



Africa is one of the fastest growing regions for credit unions in the world with more than 34,000 CUs and financial cooperatives serving 43 million people in 29 countries — a vastly different market compared to the U.S. The median age of its population is 18 and the average loan is only \$339 per member. Yet, CUs in both continents share the same mission of people helping people. Find out how CUs in

Africa are leveraging Fintech to serve members, utilizing digital transformation, overcoming cultural barriers as they try to serve more women, and make positive impact in their communities. Discover how to apply the same strategies in this emerging market to your credit union today.

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LENDING SUMMIT

MILANO 4

## Real-World, Practical Tactics to Increase Loan Growth & Member Loyalty

**KEITH & REBECCA KLEIN SCOTT**, Founders; TALLsmall Productions, LLC

**JOHN FELTON**, CEO, Southern Chautauqua Federal Credit Union



When was the last time your lending department called members to get ALL of their business? Get a behind-the-scenes look into how one CU is beating the competition by actively going after new loans and refinancing



opportunities by contacting their members to generate a 96% L/S ratio. The secret is how they did it and tracked their metrics. Plus, you will learn from the trainers who worked with the lending department on best

practices for engaging with members, uncovering hidden opportunities for saving members' money, and taking market share from the competition. You will learn not only what they did, but how they did it!

## The Leadership Pipeline: Creating a System for Developing Tomorrow's Leaders in Your CU

**TAMRA GAINES**, President, Tamra Gaines & Associates



CUs face a trifecta of challenges: the ongoing war for talent, the retirement wave of Boomers, and the imperative to cultivate trust and loyalty. Join us for an insightful and content-rich session where we discuss strategic solutions to nurture and develop leadership within CU, navigate the complexities of succession planning, foster a culture that not only retains existing talent but also attracts new members and employees. Gain clarity on actionable steps to not only adapt to the current challenges but to thrive in the dynamic work climate. Elevate your CU's potential by proactively addressing the issues at hand and charting a course towards a resilient and prosperous future.

## Data Analytics: Your CU's Secret Power for Creating Member Value

**ANNE LEGG**, Founder, THRIVE Strategic Services

**TAD CARLSON**, VP – IT Solutions & Development, Royal CU



Data isn't the issue for credit unions; activating it is. For the majority of credit unions, data feels completely overwhelming. Common questions are: How do I access the most reliable and valid data? How can I use it to improve



my members' lives? Do I need new tools? Do I have the right people? How much and how long? This session will highlight the data journey of Royal Credit Union and learn from Tad Carlson, Royal's VP – IT Solutions &

Development and how they use data to drive key decision-making and create member value. Spoiler Alert this does involve AI. Plan on attending this session to gain actionable takeaways to help jump-start your data journey.

## FINANCIAL SUMMIT

MILANO 8

## Managing Investments In A Volatile Market: Practical Approaches CUs Can Easily Apply

**EMILY HOLLIS**, CEO, ALM First

As net income margins continue to tighten, CUs are looking for alternative income streams to manage the balance sheet. In this session, ALM expert Emily Hollis discusses the fixed investments allowable under NCUA and

some states and which sectors perform best in a highly anticipated falling rate market. For those seeking enhanced yield, she also reveals various options through the Employee Benefits Pre-Fund and Charitable Donation accounts. You won't want to miss her top investments to avoid! Plus, be among the first to learn about a new fund with AACUC that everyone will be talking about.

(SESSION REPEATED FROM 1:45 - 2:15 PM)

## AACUC Signature Closing Party



ALL ARE

WELCOME

AACUC's Signature Closing Party is a must-attend event and this year in Vegas won't disappoint! This is your time to step out and dance the night away at an affair like none other, hosted by THE DJ Callihe.

All registered conference attendees are invited to participate in AACUC's Signature Closing Party.

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# Can you call it growth if it never impacts the bottom line?



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**KASASA**<sup>®</sup>  
Now that's **real** growth.<sup>™</sup>

# Day 3

FRIDAY | AUGUST 2, 2024

7:00 am– 12:00 pm

MILANO V

## AACUC Lounge



Last chance to meet up with friends and colleagues. All registered conference attendees are welcome. The Lounge will close at noon.

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7:30 - 9:00 AM

OCTAVIUS

## Buffet Breakfast

9:00 - 9:50 AM

OCTAVIUS | GENERAL SESSION

## Underground Collision: Generative AI - Who's Gonna Tell Your Story?

SUSAN MITCHELL, CEO, Mitchell, Stankovic & Associates

RAJ BANDARU, CIO, Kinecta FCU

ASHLEY HOLLOWAY, Partner Sales Manager, Amazon

CORY MADDEN, Board Director, Ventura County CU



Generative AI is creating both excitement and anxiety. The latest technology has the potential to transform how we do business, similar to how the Internet upended how we bank, shop and communicate. Yet, for the first time, technology has the potential to

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learn and create – like humans. Learn how to control your story as the technology unfolds in this controversial panel discussion. Find out where the real risks lay ahead for CUs ... how to leverage AI for go-to market strategies ... how boards will need to govern in an AI world ... and how the technology can be used to make a positive impact on your CU and your members.

9:50 - 10:00 AM

OCTAVIUS | GENERAL SESSION

## 2-Minute Spotlight: 4 Speakers Have Just 2 Minutes to Share One BIG Idea in This Theatrical Presentation

**JIM BOUCHARD**, Founder, The Sensei Leader

**GABE KRAJICEK**, CEO, Kasasa

**CAROLYN JORDAN**, Chief Growth Officer, Neighborhood CU

**JAMES POGUE, PH.D**, CEO, JP Enterprises



10:00 - 10:15 AM

OCTAVIUS | GENERAL SESSION

## Putting Thought to Action: Applying Your Best Take-Aways

**SHAWNA SUCKOW, CSP**, Author, *The Roaring 2020s: Better Sales & Marketing in the Decade of Transformation*



This dynamic 15-minute session will transform your best conference insights into actionable steps, while also giving you one more opportunity to connect with someone new. In this short time, you'll harness the full potential of your conference experience and leave with practical tools to implement your newfound knowledge immediately. You'll engage, connect, and propel your goals forward with your fellow attendees.

## El vs AI: 5 Powerful Lessons for Credit Union Leaders

**BRANDI STANKOVIC, ED.D.**, Host & Producer, The Strategic Hotbox



While AI might be able to automate tasks and even boost productivity, the need for leaders to connect on a human emotional intelligence level is more critical than ever. EI (not AI) gives us the ability to develop strategic visions, collaborate, lead, adapt, provide better member service and make ethical decisions. In short, we need to strike a delicate balance of leveraging our human skills while also taking advantage of AI advancements. Join one of the CU Leadership Convention's highest-rated speakers, Brandi Stankovic, in this closing keynote as she explores 5 strategies CUs are effectively using to integrate EI with AI to better serve their members, their credit union and their communities.

11:00 AM

## ADJORN

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EXHIBIT HALL ENTRANCE



GENERAL SESSIONS



**1410 AACUC (+ booth 1711)**

**1610 Abrigo**

1404 ADDVantage Credit Union Staffing

**1605 Allied Solutions**

1421 ampliFI Loyalty Solutions

**1618 AVANA Capital / Extensia Financial**

1704 BankJoy

**1412 BlastPoint, Inc**

1413 Catalyst Corporate Federal Credit Union

**1522 CFS Insight**

1708 Cornerstone Advisors

1720 Cornerstone Resources

1422 Credit Union Repos

1609 Credit Union Travel

1608 CU Conferences

1728 CU Evolution

1623 CU\*Answers

1406 CUCollaborate

1504 D. Hilton Associates, Inc.

**1418 Darling Consulting Group**

1624 Earnest Consulting

1712 Econocheck Corporation

1505 Ecu Technology

1722 Elan Advisory Services

1529 Envisant

1528 FileYourTaxes.com

1512 Financial Supermarkets

1724 Gallagher Benefit Services

NA HR Performance Solutions

1718 inLighten

1419 Invo Solutions

**1508 Kasasa**



GENERAL SESSIONS

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EXHIBIT HALL ENTRANCE

GOLD NOTES WHERE THE SPONSORS ARE LOCATED.

**1513 KellMoore & Associates LLC**

- 1405 Lenders Cooperative
- 1425 Lucky Soap
- 1409 Marquis
- 1525 Member First Mortgage, LLC

**1521 Modelshop**

- 1629 MSC Security
- 1613 myCUMortgage
- 1604 MySherpas
- 1420 Narmi
- 1403 National Credit Union Administration

**1619 Open Lending**

- 1611 Parc Street Partners

**1511 PFP Services**

- 1524 PureIT CU Services

**1705 REPAY**

- 1709 Sheeter Group
- 1423 State National Companies
- 1425 Stearns Financial Group
- 1509 Stukent
- 1628 SWBC

**1620 The Member Closing Center****1618 Trellance****1411 TruStage**

- 1429 United Solutions Company

**1518 Velera**

- 1523 Visa
- 1625 Vizo Financial

**1408 ZEST AI**

# Company Information

Booth No.

## **AACUC ..... 1410/1711**

The African-American Credit Union Coalition (AACUC) unites the credit union movement to ensure Diversity, Equity, and Inclusion and advocates for the 8th Cooperative Principle focused on DEI. We promote financial inclusion and professional development through our support for all credit unions and create bridges between community-based organizations and consumer-focused initiatives to increase opportunities to close the racial wealth gap.



[aacuc.org](http://aacuc.org)



## **Abrigo..... 1610**

Abrigo enables 2400+ U.S. financial institutions to support their communities through technology that fights financial crime, grows loans and deposits, and optimizes risk. Abrigo's platform centralizes the institution's data, creates a digital user experience, ensures compliance, and delivers efficiency for scale and profitable growth. Make Big Things Happen.



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



## **ADDVantage Credit Union Staffing..... 1404**

ADDVantage Credit Union Staffing is a dedicated group of professionals specializing in staffing exclusively for credit unions on a temporary, temp-to-hire and direct-hire basis. We are a niche staffing service fully committed to leaving "no stone unturned" in an effort to find the most qualified candidates for every position and department in your credit union. We are the only staffing company that is solely dedicated to Credit Unions only.



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

**Allied Solutions..... 1605**

Allied Solutions is one of the largest providers of insurance, lending, risk management, and data-driven solutions to financial institutions in the US. Allied Solutions uses technology-based solutions customized to meet the needs of 4,000 banks and credit unions, along with a portfolio of innovative products and services from a wide variety of providers. Allied Solutions is headquartered in Carmel, Indiana and maintains several offices strategically located across the country. Allied Solutions is a wholly owned and independently operated subsidiary of Securian Financial Group.



[alliedsolutions.net](http://alliedsolutions.net)

**ampliFi Loyalty Solutions ..... 1421**

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](http://amplifiloyalty.com)

**AVANA Capital / Extensia Financial ..... 1618**

AVANA CUSO formerly Extensia Financial is headed by an exceptional group of leaders hailing from Credit Unions and Mortgage Lenders who have the network and experience in building partnerships and sourcing deals. AVANA CUSO partners with an expansive network of Credit Unions to diversify their lending portfolios, expand their geographical footprint and mitigate concentration risk through loan participations. Our parent company is AVANA Capital.



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





**BankJoy ..... 1704**

Bankjoy, delivers modern banking technology, including mobile banking, online banking, and a banking API to credit unions — big and small. The company prides itself on creating beautiful products with advanced features, simple navigation, modern look and feel, and world class user experiences shaped by talking to users. Bankjoy is backed by Curql Collective, Bessemer Venture Partners, Y Combinator, and CheckAlt. The company was recently recognized as “The Best Digital Banking Platform” in the 2024 FinTech Breakthrough Awards.



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

**BlastPoint, Inc..... 1412**

BlastPoint builds AI-powered, result-driven member intelligence software that helps Credit Unions target the right members, at the right time, through the right channels with just the right message. Designed for business teams, BlastPoint’s Member Intelligence Platform makes data insights accessible and actionable. BlastPoint has enabled Credit Unions all across the country to operationalize member data, meet member experience goals, and become member-focused organizations.



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

**Catalyst Corporate Federal Credit Union ... 1413**

Catalyst is igniting change and unlocking new possibilities for America’s credit unions and the members they serve. Whether through innovative payments, asset management or liquidity solutions, we’re passionate about transforming goals into achievements and helping credit unions grow. Smart credit unions seek smart solutions for success. And success requires expertise – knowledge, leadership and the confidence to resolve problems. Catalyst has those and can work with you to find ways to win...because we believe collaboration makes a difference.



[catalystcorp.org](https://catalystcorp.org)

**CFS Insight..... 1522**

CFS Insight provides proven software products, rapid development, prudent advice, and responsive customer service that empower your credit union to make data-driven decisions. Our solutions are designed to streamline decision-making and enhance operational efficiency. By simplifying complex data challenges, we help credit unions extract valuable insights for better member service and deeper engagement.

Our comprehensive solutions include Data Integration from over 40 sources, ready-made Analytic Models, custom development of reports and dashboards, and Data and Analytic Strategy. With a focus on practical implementation, CFS offers coaching, workshops, and detailed analytic consulting to align with your strategic and operational objectives.



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

**Cornerstone Advisors..... 1708**

For more than 20 years, Cornerstone Advisors has delivered gritty insights, bold strategies and data-driven solutions to build smarter banks, credit unions and fintechs. Cornerstone combines its expertise with proprietary data to help financial institutions thrive in today's challenging environment. For more information, visit us at [www.crnrstone.com](http://www.crnrstone.com) or on LinkedIn.



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

**Cornerstone Resources..... 1720**

Cornerstone Resources provides executive recruiting and professional staffing services in all 50 states. Whether your credit union is seeking new executive leadership, back office support, or front line staff, Cornerstone Resources has solutions for you.



[cornerstoneresources.coop](http://cornerstoneresources.coop)

**Credit Union Travel ..... 1609**

Credit Union Travel offers members exclusive access to travel savings and experiences, while helping credit unions develop strategies to capitalize on their members' current trends. Americans currently spend over \$1 trillion per year on travel, and that figure is projected to double by 2030. CU Travel partners are tapping into this market to boost income, grow membership, and promote products. CU Travel ensures that the value remains within the credit union community, serving as both an offensive and defensive strategic partner.



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



**CREDIT UNION  
TRAVEL**

**CU Conferences ..... 1608**

Now in our 45th year, CU Conferences continues to be a leader in credit union education and professional development. Each year, thousands of CEOs, Senior Management, Directors, and Committee Members, from credit unions across the country participate in CU Conferences' programs to learn about the latest in board development, asset management, marketing, operations, staff development, technology and to get the most targeted credit union management training available.



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

**CU Evolution ..... 1728**

CU Evolution is a CUSO that began in 2018 with a mission to provide Credit Unions with assets primarily between \$50 million and \$250 million a solution to offer member business loans, 1-4 family investment property loans, lot loans, and interim construction loans to their members and prospects in a financially feasible product. The program allows these credit unions to increase loan interest income, fee income, deposits, and profitability for a fraction of the cost of implanting an in-house commercial and MBL department.



[cu-evo.com](http://cu-evo.com)

**CU\*Answers ..... 1623**

CU\*Answers offers expertise in implementing technical solutions to operational needs, and is a leader in helping credit unions form strategic alliances and partnerships. CU\*Answers provides a wide variety of services for credit unions including its flagship CU\*BASE® processing system (online and in-house) and Internet development services featuring It's Me 247 online and mobile banking. Additional services include web development, network design and security, and image check processing. Founded in 1970, CU\*Answers is a 100% credit union-owned cooperative CUSO providing services to credit unions representing over 2 million members and \$26 billion in credit union assets.



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

**CUCollaborate ..... 1406**

CUCollaborate champions credit union growth through disruptive innovation. We combine industry-leading strategy and software to help credit unions achieve growth and minimize risk. But we're more than credit union experts. CUCollaborate's aim is to help credit unions adapt, grow, and succeed long term by offering the innovation, insight, and know-how to help them do it. We look for creative solutions to take our clients out of their comfort zones and into a new phase of growth. We do it by building pioneering software solutions that help our clients achieve success now and in the future.



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

**D. Hilton Associates, Inc..... 1504**

D. Hilton Associates focuses on the full executive lifecycle from recruitment to succession. Our solutions include executive recruiting, compensation plans, retention and retirement strategies, and benefits implementation. We are recognized by Forbes as one of America's Top 100 Executive Recruiting Firms. For more information and current nationwide job opportunities, visit [www.dhilton.com](http://www.dhilton.com).



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

**Darling Consulting ..... 1418**

For over 40 years, DCG's only business has been to help credit unions manage balance sheets effectively. DCG provides independent risk management consulting and strategic advisory services, including asset/liability management, model risk management/validation, capital planning, and data-driven solutions (deposit and loan analytics, liquidity, credit stress testing), bringing clarity to the complex.



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

**D·C·G**  
DARLING CONSULTING GROUP

**Earnest Consulting ..... 1624**

Earnest Consulting Group works with credit union boards and senior management to:

- Build strategies to reward and retain key executives through Executive Benefits
- Provide solutions to offset employee benefit costs
- Enhance the credit union's charitable giving opportunities



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

**Econocheck Corporation ..... 1712**

Econocheck delivers bottom-line benefits to financial institutions by strengthening account-holder relationships and providing new fee income streams. Since 1973, thousands of financial institutions have profited from Econocheck's data-driven retail checking strategies, direct response insurance programs, and identity protection services. Our customized solutions offer the enhanced services valued most by consumers and businesses — identity & data security, cell phone protection, credit monitoring, entertainment discounts, health savings, and financial management tools — while providing our partners with recurring revenue and measurable gains in customer retention. Listening, delivering, partnering, growing — the Econocheck way for the last 50 years.



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

# Ecu Technology ..... 1505

Online Account Opening & Loan Origination Platform Growth Starts Here.

The ORIGINS® Platform, powered by eCU Technology®, is a comprehensive, fully configurable financial services solution that streamlines the application, origination & underwriting operations through an ever-evolving team of partnerships and integrations.

The result for our clients is a simplified process with increased efficiency & productivity for your organization and an enhanced user-experience for your members.



# Elan Advisory Services ..... 1722

Elan partners with credit unions through our outsourced credit card program, mortgage solutions, and all-in-one merchant processing platform, talech®. Our dedication to our partners, growth philosophy, and investment in technology has made us a leader in the industry since 1968. Our approach offers expertise while removing costs, reducing risks, and improving the card member experience. Learn more about our innovative solutions for consumer and business accounts of all sizes.

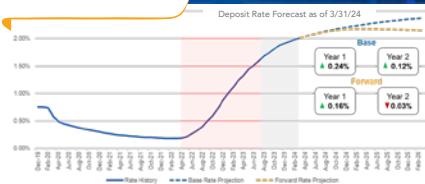


LEARN MORE



Master the Art of Deposit Pricing Strategy with Deposits360®

STOP BY BOOTH #1418



**Envisant ..... 1529**

Envisant helps credit unions achieve their vision through a combination of experience and incomparable expertise. Envisant's forward-thinking product strategy features credit and debit programs, CUMONEY® Prepaid Visa® reloadable and gift card programs (both plastic and virtual), agent credit card programs, ATM services, and more! We support our credit union partners with in-house customer service, an experienced Portfolio Development Team, and help developing and managing successful marketing promotions. Achieve your vision with us!



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

**FileYourTaxes.com ..... 1528**

FileYourTaxes.com is a trailblazer as one of the original IRS approved do-it-yourself tax software companies since 1995. Our platform provides individuals with a faster and simpler method to file their taxes, ensuring compliance and accuracy with the latest IRS tax laws.

During tax season, a common challenge many Credit Unions face is potential revenue loss due to large tax software companies encouraging members to open new fintech accounts with them, resulting in the tax refund going to a new account instead of following the traditional banking relationship.



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

**Financial Supermarkets ..... 1512**

Celebrating 40 years, Financial Supermarkets, Inc. (FSI) is the nation's leader for attractive, functional, and professionally designed in-store, on-site, 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](http://supermarketbank.com)

## Gallagher Benefit Services ..... 1724

Gallagher's Executive Benefits team consults with credit unions on recruiting, retaining, and rewarding their executives and other 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. More than 600 credit unions leverage Gallagher's extensive service model and long-term stability amid market disruptions. Gallagher is the NAFCU partner for Executive Benefits and Compensation Consulting and produces the annual NAFCU-Gallagher Executive Compensation and Benefits Survey which helps credit unions stay competitive and retain key talent.



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

## HR Performance Solutions .....NA

HR Performance Solutions supports innovative organizations with purpose-driven compensation, performance, and learning management software. Our products are developed on the premise that successful organizations are built on the talent of effective employees. With over 2,000 clients, we combine our industry-leading software with industry-leading consultants to make a difference for HR professionals across the country, truly changing the way you do HR.

The HR Performance Solutions team consists of passionate HR experts and software developers with a mission to create solutions that solve the most complex, but common, challenges faced by all organizations. Performance, learning, and compensation are three core elements of talent management that enhance the employee experience

## inLighten .....1718

inLighten is the leading provider of digital signage solutions for the credit unions. Servicing the financial industry since 1989 and currently supports over 2,500 financial institutions in over 15,000 retail branches and corporate facilities in all 50 states, throughout Canada and in a



variety of international locations all of which engage their audiences with inLightens products each day. inLighten's solutions include traditional and interactive digital signage, video walls, self-service kiosks and tablets, on-hold and environment audio, check-in and queuing systems and more. inLighten's intuitive, cloud-based management system enables creation, scheduling and distribution of dynamic content from inLighten's hosted network.



[inlighten.net](http://inlighten.net)

## **Invo Solutions ..... 1419**

Invo Solutions was founded in 2012 to develop the industry's first in-branch video banking experience. Their staff combined more than 75 years of experience to solve a unique problem in the industry. Since then, Invo has added features such as SMS texting, co-browsing, appointment scheduling, and chatbot, as well as web and mobile video banking. Invo's customer engagement platform bridges the gap between physical and digital channels, creating more ways for customers to reach their financial institutions, solving staffing shortages, and decreasing lobby wait times.



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

## **Kasasa..... 1508**

Kasasa® is an award-winning financial technology and marketing services company that helps community financial institutions create real growth with real deposits, real margin, and real engagement. Our mission: to help local banks and credit unions compete for their rightful share of the market against even the largest banks.

As the innovative leader in branded, community-powered banking products proven to drive profit and growth for community financial institutions, Kasasa is helping community institutions thrive even as the industry landscape presents new challenges and competitors.



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

**KASASA®**

**KellMoore & Associates LLC ..... 1513**

KellMoore leads the industry with innovative plan design that assists credit unions in attracting, retaining, and rewarding their top talent through compensation consulting; design and implementation of customized Executive benefit plans; benefit expense offset; and succession planning.



[kellmoore.com/our-firm](http://kellmoore.com/our-firm)

**Lenders Cooperative..... 1405**

At Lenders Cooperative, we believe in empowering financial institutions to better serve their communities by facilitating access to business capital. We exist to enable banks and credit unions to support the growth and success of local businesses efficiently and effectively.

Our mission is to make lending easier and more accessible, driving positive change for businesses, financial institutions, and the communities they serve. We do this by providing comprehensive commercial loan origination software (LOS) and professional services.



[www.lenderscooperative.com](http://www.lenderscooperative.com)

**Lucky Soap ..... 1425**

Lucky Soap – an extraordinary experience where delightfully handcrafted soaps, bath bombs, and sugar body scrubs smell as delicious as they look!

Each one of our bakery-inspired bath and body treats is handmade by some of the most amazing artisan soap makers on the planet.



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

**Marquis ..... 1409**

Dedicated. Driven. Determined to excel. Marquis has a passion for performance and plays to win for over 700 banks and credit unions nationwide. We are experts in marketing and compliance customer data platforms (CDP) software, analytics, and solutions. We offer various products, including CRM, journey orchestration, conversational analytics, strategic consulting, cloud services, website design, and digital communication tools, all designed to give clients every advantage.



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

**Member First Mortgage, LLC..... 1525**

Member First Mortgage is a Credit Union owned CUSO offering a variety of partnership options designed to fit the unique needs of Credit Union's.

- Affiliate, Wholesale and Correspondent partnerships.
- Complete suite of Conventional, Government & CU Portfolio products
- Fulfilment Services
- Servicing/Sub-Servicing



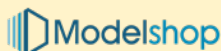
[memberfirstmortgage.com](http://memberfirstmortgage.com)

**Modelshop ..... 1521**

For over a decade, our clients have used Modelshop's Risk & Credit Decision Engine to make more accurate customer origination decisions, reduce default and fraud losses, increase straight-through automation, and deliver an uplift in revenue growth.



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



**MSC Security ..... 1629**

MSC Security is a Cybersecurity and IT Managed Services firm dedicated to serving organizations of all sizes. As technology advances and the digital realm expands, so do the risks associated with data breaches, ransomware attacks, and other malicious activities. Our mission is to empower businesses and consumers worldwide, providing them with the tools, expertise, and peace of mind necessary to navigate the digital domain with confidence. With our relentless commitment to privacy and data protection, we deliver cutting-edge security solutions tailored to meet the unique challenges faced by organizations today.

**myCUMortgage ..... 1613**

As a mortgage CUSO, myCUMortgage will provide scalability to help your credit union stay in front of changing market conditions and member expectations for mortgage originations, secondary market funding and loan servicing. Through our partnership, we will provide the options of full-service retail origination, wholesale or correspondent lending channels. Count on customized solutions with access to our digital marketing and member retention systems, mortgage origination technology, and myCUMortgage experts for training, marketing, originations, processing, underwriting, servicing and secondary market access. Plus, you have the flexibility to incorporate your portfolio loans or choose to retain servicing. We partner with credit unions nationwide to empower credit unions to become GREAT mortgage lenders! For scalable solutions, reach out to our Credit Union Development Managers Dawn Rudie and Denise Stewart at sales@mycumortgage.com or visit www.mycumortgage.com. Let's talk! Equal Housing Opportunity. NMLS# 565434.



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- Earn Higher Yields
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- Manage Risk
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**Navigating Auto Finance Challenges for Near- and Non-Prime Consumers**

1:15 PM - 1:40 PM  
July 31st, 2024  
Lending Summit

**The New Fundamentals of Automotive Lending**

10:45 AM - 11:15 AM  
August 1, 2024  
Lending Summit



**Matt Roe**  
Open Lending CRO

## MySherpas ..... 1604

mysherpas is an all-in-one, “done-for-you” platform that handles the heavy lifting of loan processing. Set-up...outreach to borrowers...document management...all done for you. Our platform consolidates emails, attachments, needs lists, and loan application status into one central location visible to all. mysherpas is an easy-to-use, streamlined digital workspace that does the heavy lifting for lending teams and provides a better experience for the borrower. We are at booth #1604. Qualified lenders who see our platform demo, will receive a mysherpas backpack (while supplies last)!



[mysherpas.ai](https://mysherpas.ai)

## Narmi..... 1420

Narmi empowers financial institutions to unlock the latest in digital banking and account opening, enabling them to move faster, tap growth opportunities, and be where banking is going. Through an effortless, current, and dependable experience, customers see results 3x account growth in <30 days and win awards like Nerdwallet’s Best Online Experience.



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

## National Credit Union Administration ... 1403

Created by the U.S. Congress in 1970, the National Credit Union Administration is an independent federal agency that insures deposits at federally insured credit unions, protects the members who own credit unions, and charters and regulates federal credit unions. The NCUA protects the safety and soundness of the credit union system by identifying, monitoring and reducing risks to the National Credit Union Share Insurance Fund.



[ncua.gov](https://www.ncua.gov)

## Open Lending ..... 1619

Open Lending is an industry trailblazer in Lending Enablement Solutions for U.S. financial institutions. With AI-powered risk analysis, fully automated decisioning, and built-in default insurance, its decisioning engine Lenders Protection™ enables lenders to drive ROA while managing risk. Using proprietary and third-party data attributes, Lenders Protection™ analyzes 2 million risk profiles in as little as five seconds, empowering lenders to automatically score, price, and decision insurance-backed loans at scale. A trusted partner for achieving key lending objectives, the company has empowered financial institutions to create auto loan portfolios in excess of \$20 billion.



[openlending.com](https://www.openlending.com)

 OpenLending

## Parc Street Partners ..... 1611

PARC Street Partners, an independent financial services company, is committed to helping credit unions and non-profits provide cost-effective benefits plans designed to attract and retain talent. PARC stands for Plan, Attract, Retain and Compensate. PARC Street Partners offers both types of SERP options available to the non-profit world, Split Dollar plans as well as 457f plans.



[parcstreetpartners.com](https://www.parcstreetpartners.com)

**PFP Services ..... 1511**

For over 50 years, PFP has been serving hundreds of credit unions across the country and providing families with affordable insurance protection. As the largest distributor of individual insurance products sold directly to credit union members, we strive to make sure everyone has a secure future. In addition to offering affordable insurance solutions, PFP helps credit unions thrive. We take a look at the challenges each of our credit union partners may face, and we find opportunity.



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

**PureIT CU Services ..... 1524**

Pure IT is a Credit Union Service Organization that provides Strategic Technology Consulting. We partner with credit unions to offer Professional Services, Infrastructure Project Implementations, and Technology Managed Services. With partnership at its core, Pure IT can tailor technology solutions to the competitive advantage of each credit union. We use technology to fulfill credit union strategy and business needs, creating an efficient IT ecosystem that helps our partners achieve their goals.



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

**REPAY ..... 1705**

Simplify payment processing, streamline reconciliation, reduce servicing costs and deliver a convenient, self-serve experience for members through next-generation payment technology from REPAY (NASDAQ: RPAY). Integrated with the leading core systems, REPAY enables credit unions to accept payments anytime, anywhere and instantly fund loans through realtime disbursements.



[repay.com/credit-unions](http://repay.com/credit-unions)

**Sheeter Group ..... 1709**

The Sheeter Group works exclusively with credit unions designing 457(f), Collateral Assignment Split Dollar, Post-

Retirement Healthcare, Section 162 Bonus, and Employee Benefit Expense Offset plans. Developing tailored plans to Attract, Retain and Reward Executives essential to the success of the credit union.



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

## **State National Companies ..... 1423**

You've worked hard to build your portfolio. Let State National give you the protection it deserves. Lenders nationwide use our array of proven, customized solutions to reduce charge-offs and improve the customer experience. When you choose State National, you're forming a partnership with the leading firm in the industry.



[www.statenational.com](http://www.statenational.com)

## **Stearns Financial Group ..... 1425**

Leverage our expertise to drive yield, supplement retirement, and optimize retention and succession. With over 25 years specializing in executive retention and retirement plans for credit unions, Stearns Financial has the expertise to design, implement, and administer every type of executive benefit program.



[stearns.financial](http://stearns.financial)

## **Stukent..... 1509**

Through innovative, first-in-the-world Simternships™ and annually updated courseware, Stukent supports educators' efforts in preparing students to work in dynamic industries. Since 2013, we've helped thousands of educators prepare nearly a million students for professional success.



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

## **SWBC..... 1628**

Headquartered in San Antonio, SWBC is a diversified financial services company providing a wide range of insurance, mortgage, and investment services to financial institutions, businesses, and individuals. With more than 2,600 employees and offices across the country, SWBC



is committed to providing quality products, outstanding service, and customized solutions in all 50 states.



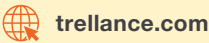
**The Member Closing Center ..... 1620**

The Member Closing Center (MCC), founded in 2014 by Johnny Garlich and Jennifer Box in St. Louis, Missouri, pioneers a transformative approach to auto loans through strategic partnerships with America's leading credit unions. The MCC Strategy doubles direct loan revenue while simultaneously improving the financial health of credit union members. We are dedicated to empowering members by enhancing the loan signing experience with innovative, digital solutions that educate and engage.



**Trellance ..... 1618**

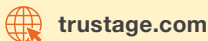
Trellance is a credit union cooperative and a leading technology partner for credit unions, delivering innovative technology solutions to help credit unions achieve more. With a comprehensive suite of analytics, cloud and talent solutions, the Trellance team ensures credit unions increase efficiency, manage risk, and improve member experience. As a tech partner, Trellance ensures that credit unions have access to the latest generation of fintech solutions, filled with powerful tools such as artificial intelligence and machine learning.



**TruStage ..... 1411**

TruStage (Named by Forbes as one of America's Best Insurance Companies 2024) is a financially strong insurance, investment and technology provider, built on the philosophy of people helping people. We believe a brighter financial future should be accessible to everyone,

and our products and solutions help people confidently make financial decisions that work for them at every stage of life. With a culture rooted and focused on creating a more equitable society and financial system, we are deeply committed to giving back to our communities to improve the lives of those we serve.



## United Solutions Company ..... 1429

The United Solutions CUSO is owned and operated by the credit unions we service. Incorporated in 1983, USC provides financial technology solutions to the credit union industry. We currently service over 225 financial institutions in 33 states. At our core, we are an IT CUSO specializing in core data processing. USC provides many services to credit unions across the nation including, Core Data Processing, Network Services, Collections, and much more.



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THE  
MEMBER CLOSING  
CENTER

\*New accounts that close 100 qualifying auto loans in 90 days are eligible for the \$40,000 bonus. Some exclusions apply.

**Velera ..... 1518**

Velera, formerly PSCU/Co-op Solutions, is the nation's premier payments credit union service organization (CUSO) and an integrated financial technology solutions provider. With over four decades of industry experience and a commitment to service excellence and innovation, the company serves more than 4,000 financial institutions throughout North America, operating with velocity to help its clients keep pace with the rapid momentum of change and fuel growth in the new era of financial services. Velera leverages its expertise and resources on behalf of credit unions and their members, offering an end-to-end product portfolio that includes payment processing, fraud and risk management, data and analytics, digital banking, instant payments, strategic consulting, collections, ATM and POS networks, shared branching and 24/7/365 member support via its contact centers.



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

**velera**

**Visa ..... 1523**

Visa is proud to partner with and invest in community financial institutions and other industry organizations to strengthen local economies and communities. We aim to be an extension of your team to help bring innovation, trust, access and prosperity to your communities. Visa has dedicated teams in seven regions across the country to help support community financial institutions like yours. We're here to help you stay competitive while also engaging in activities relevant to the needs of your local communities. We partner with state and national associations, industry innovators, researchers and change makers to maximize our relevancy and impact in your region.



[visa.com/communityissuers](http://visa.com/communityissuers)

**VISA**

**Vizo Financial..... 1625**

Vizo Financial Corporate Credit Union is a cooperative built by credit unions. We're a state-chartered corporate credit union and a provider of back-office solutions in the areas of money management, payments, core processing and education. We're a forward-thinking organization that places a strong emphasis on innovation, strategy and building connections.

We've found that the secret to our success is recognizing that we are all one in the same. With the same last name – credit union – we can put collaboration first and help each other achieve a common goal...financial wellbeing for all. For more information about Vizo Financial, please visit [www.vfccu.org](http://www.vfccu.org).



[vfccu.org](http://vfccu.org)

**Zest AI ..... 1408**

Since 2009, Zest AI has been pioneering and perfecting AI underwriting technology. With a mission to broaden access to equitable lending using smart, inclusive, and efficient AI, Zest AI aims to make its best-in-class technology available to credit unions of all sizes. A US-based CUSO with over 500 active models, Zest AI has been helping clients decrease risk and boost equity throughout the lending process to build durable businesses and grant consumers fair, consistent credit decisions.

Credit unions that partner with Zest AI see, on average, 40% in approvals across protected classes. To learn more, stop by booth 1408 or visit [zest.ai](http://zest.ai).



[zest.ai](http://zest.ai)

**ZEST** 



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