

CU Reality Check

MONDAY

4:00 p.m.

Hotel Check In

4:00–5:30 p.m.

Conference Registration | *CCC Pre-Function*

7:30–8:30 p.m.

Welcome Reception | *CCC Pre-Function*

TUESDAY

7:30–9:00 a.m.

Conference Registration | *CCC Pre-Function*

7:30–8:45 a.m.

Breakfast Buffet | *American Bar & Grille*

9:00–9:15 a.m.

Welcome Address | *CCC*

9:15–10:15 a.m.

Sam Maule - AI and ML – What's the Truth? What's the Hype? | *CCC*

10:15–10:30 a.m.

Networking Break with our Sponsors | *CCC*

10:30–11:30 a.m.

Scott Wham - Moneyball and the Case for Employee Wellbeing | *CCC*

11:45 a.m.–12:45 p.m.

Lunch Buffet | *American Bar & Grille*

1:00–2:00 p.m.

Viola Llewellyn - How to Effectively Engage Communities and Foster Inclusion | *CCC*

2:15–2:45 p.m.

Networking Break with our Sponsors | *CCC*

2:45–3:45 p.m.

John Kutchey – Update on Examination Issues and Supervisory Priorities for the Eastern Region | *CCC*

3:45–4:45 p.m.

James Robert Lay - Empathy Gap in Sales and Lending | *CCC*

5:00–6:00 p.m.

TruStage Happy Hour | *CCC Pre-Function*

WEDNESDAY

8:00–9:00 a.m.

Breakfast Buffet | *American Bar & Grille*

9:15–10:15 a.m.

Tanya Van Court - How to Navigate the \$70 Trillion Great Wealth Transfer: A Roadmap for Credit Unions | *CCC*

10:15–10:45 a.m.

Networking Break with our Sponsors | *CCC*

10:45–11:45 a.m.

Caroline Vahrenkamp - The Credit Union Renaissance: Emerging Trends & Strategic Priorities | *CCC*

11:45 a.m.–12:00 p.m.

Closing Remarks and Safe Travels | *CCC*

12:00 p.m.

Check Out

CCC=Central Conference Center

AGENDA

AI and ML – What’s The Truth? What’s the Hype? | Sam Maule

Every industrial revolution was (and is) dependent on the convergence of multiple new technologies. The 4th Industrial Revolution, which is currently taking place, is no different. AI is a key technology driving this revolution. While it is true that AI will replace many of the traditional banking jobs, it will also greatly enhance and augment other banking roles, improve the personalization of banking products and services, and provide your members with the next wave of financial products.

Moneyball and the Case for Employee Wellbeing | Scott Wham

Soon, employers will be forced into greater competition with each other over dwindling supply of qualified workers. This competition will be costly for the unprepared. While it’s easy to blame the challenges employers are facing on COVID-19, the data suggests more nuanced variables driving employee disengagement. In this presentation, we will look at how small and mid-sized credit unions can apply the lessons from Moneyball to compete against much larger companies by building a thriving, ethical, and profitable culture centered on employee wellbeing.

How to Effectively Engage Communities and Foster Inclusion | Viola Llewellyn

Your communities are made up of a myriad of potential members from an unimaginable range of cultures and countries-of-origin. Is your financial institution doing all that it can to serve the populations of people who may not be readily visible to you? Viola will offer fascinating insights on how some cultures view finances, including non-traditional borrowing and saving habits.

Update on Examination Issues and Supervisory Priorities for the Eastern Region | John Kutchey

We’ll discuss current key emerging issues and challenges for credit unions and the financial sector, and priorities for the NCUA examinations.

Empathy Gap in Sales and Lending | James Robert Lay

In the financial industry, empathy and communication are vital. Empathy helps us understand members’ needs, while communication helps build strong relationships. Both empathy and communication requires us to be good listeners, but how do we do that digitally? We can build strong relationships with members and help them achieve their goals. If you have the confidence to stand in your story, empathy is your next superpower.

How to Navigate the \$70 Trillion Great Wealth Transfer: A Roadmap for Credit Unions | Tanya Van Court

Boomers will pass on \$68 trillion in wealth to the next generation, but 78% of them lack confidence in their children’s ability to manage it. There’s an urgent need for financial education to ensure a successful transition of wealth. By leveraging Gen Z’s appetite for education beyond the classroom, credit unions can empower their members with the knowledge needed to achieve financial success through digital applications that meet them where they are—on their devices.

The Credit Union Renaissance: Emerging Trends & Strategic Priorities | Caroline Vahrenkamp

The Credit Union Renaissance is focused on the big emerging trends, strategic issues, and opportunities for credit unions. We are facing a uniquely challenging environment, but new opportunities are emerging for credit unions to embrace their strength.

SESSIONS