

August 12 Discovery[™]2021

 CUNA MUTUAL GROUP

Agenda-At-A-Glance
9:00 AM – 4:00 PM CT

Opening Keynote

9:30 AM – 10:30 AM
CT **Winning the Future of Finance**

Panel Discussion

10:45 AM – 11:30 AM
CT **Growing While Leading the Way on Financial Inclusion**

Breakout Sessions

11:45 AM – 12:25 PM
CT **Diversity, Equity and Inclusion from the Eyes of Credit Union CEOs**
U.S. Economic Outlook & Its Impact on Credit Unions
Auto Loans and Credit Unions: Trends, Challenges and Projections
The Hidden Growth Opportunities in Your Data

Panel Discussion

1:00 PM – 1:45 PM
CT **Leading Credit Unions and Our Industry into the Future**

Breakout Sessions

2:00 PM – 2:40 PM
CT **The Lab at MSUFCU – Accelerating Innovation, Together**
Making Strategic Choices for Growth
Preparing for Marketing Success in a Post COVID-19 World
A Strategic Imperative: Your Members' Financial Health & Well-Being

Closing Keynote

3:00 PM – 4:00 PM
CT **Get Big Things Done: Unleash Your Connectional Intelligence**

Coffee Connection

9:00 AM – 9:30 AM CT

Grab your coffee and meet us in the conference lounge for a quick chat. What sessions are you excited about? What's on your mind? Take time before the conference to connect with your industry colleagues.

Opening Keynote

9:30 AM – 10:30 AM CT

Winning the Future of Finance

[ADD TO CALENDAR](#)



**Dr. Kaihan
Krippendorff**

Strategy, Growth &
Transformation Expert,
Author and Consultant

The financial services industry – from banking to payments to insurance – is undergoing a rapid and historic transformation. The shifting regulatory landscape, changing consumer behavior, an endless stream of agile newcomers armed with disruptive fintech tools, and platforms powered by blockchain and AI are mounting an attack on incumbent institutions and business models. Kaihan uses first-hand experience and actionable insights to present a compelling vision of the future world of financial services, arming you with a framework and tools you can use to succeed in the tech-driven digital economy of the 21st century. Learn about key future trends and technologies, and how to design fresh strategies and agile teams ready to face disruption head-on so your organization can transform, compete, and win the future of finance.



Panel Discussion

10:45 AM – 11:30 AM CT

Growing While Leading the Way on Financial Inclusion

[ADD TO CALENDAR](#)



Kathy Chartier

President/CEO, Members
Credit Union (CT)



Kirk Mills

President/CEO,
St. Louis Community
Credit Union (MO)



Charlotte Nemeč

President/CEO,
Canopy Credit Union (WA)



Maurice Smith

CEO, Local Government
Federal Credit Union & Civic
Federal Credit Union (NC)

Did you know that median CDFI credit unions outperform median non-CDFI credit unions in earnings, lending, asset growth and membership growth? In the December 2020 stimulus package, Congress included \$12 billion in funding for Community Development Financial Institutions (CDFIs). This presents a large growth opportunity for credit unions, while increasing their ability to provide greater financial inclusion to improve the financial lives of their members and to strengthen their communities.

A panel of leaders from successful CDFI credit unions will share ways they have used their CDFI designation and helped more members.

Breakout Sessions

11:45 AM – 12:25 PM CT

Diversity, Equity and Inclusion from the Eyes of Credit Union CEOs

[ADD TO CALENDAR](#)



Renee Sattiewhite

President/CEO, African
American Credit Union
Coalition (AACUC)



John Bissell

President/CEO, Greylock
Federal Credit Union (MA)



Paul Kundert

CEO, University of
Wisconsin Credit Union (WI)



Maurice Smith

CEO, Local Government
Federal Credit Union & Civic
Federal Credit Union (NC)

The past several years should have left no doubt that diversity, equity and inclusion (DEI) programs are not only vital to the health of our communities, but also to our business. By 2030 multicultural consumers (and your future workforce) will make up the majority of the U.S. population, a growth that will bring new opportunities for empathetic and savvy organizations. But, how do you develop and implement a successful DEI program? Are you just starting your DEI journey or are you further along? Learn from three credit union CEOs who have championed the successful rollout of their DEI programs as they discuss their programs, challenges, and successes.

Breakout Sessions

11:45 AM – 12:25 PM CT

U.S. Economic Outlook & Its Impact on Credit Unions

[ADD TO CALENDAR](#)



Steven Rick

Director,
Chief Economist,
CUNA Mutual Group

As the COVID-19 pandemic runs its course in 2021, the economic impacts could be longer-lasting. The Federal Reserve's monetary policy and the Treasury Department's fiscal policy will be important economic topics for the next few years. Explore the possible paths of economic recovery and what impact it will have on credit union balance sheets and income statements for the next two years.

Auto Loans and Credit Unions: Trends, Challenges, and Projections

[ADD TO CALENDAR](#)



Chris Harper

Senior Director,
Filene Research Institute

Whether to purchase a vehicle and how to finance it are key questions that most consumers ask at some point in their lives. For credit unions, automobile financing is an important part of their overall lending portfolio, and helps improve members' transportation options, attract new members, and form lasting, meaningful member relationships. Learn about recent trends in auto lending, incorporating the effects of the pandemic, short and long-term projections, and next steps credit unions can take to prepare a future where auto loans remain an important part of members' financial lives and credit unions' loan portfolios.

The Hidden Growth Opportunities in Your Data

[ADD TO CALENDAR](#)



Emily Engstrom

Director, Client Success,
AdvantEdge Digital



Vicki Potter

Senior Analytics
Performance Team Lead,
AdvantEdge Digital

After more than a year of major transitions and unpredictability, it's more important than ever to understand not only what your data is telling you, but also how your credit union can use it to drive serious growth. Gain tips on how to use your data in an actionable way. Hear insights on the newest best practices, the data optimization habits of successful credit unions, and what to expect in the days ahead.

Panel Discussion

1:00 PM – 1:45 PM CT

Leading Credit Unions and Our Industry into the Future

[ADD TO CALENDAR](#)



Diana Dykstra

President/CEO, California & Nevada Credit Union Leagues, Board Chair of the American Association of Credit Union Leagues (AACUL)



Brad Green

President/CEO, Listerhill Credit Union, Board Chair of Credit Union National Association (CUNA)



Larry Sewell

Vice President, Community Outreach, Together Credit Union, Board Chair of the African American Credit Union Coalition (AACUC)



Bob Trunzo

President/CEO, CUNA Mutual Group

The expectations of employees, members, business partners and community partners have changed dramatically over the last year. A panel of credit union leaders, who also serve as board chairs for associations that help our system thrive, will share lessons they have learned and insights they believe we can apply as we look to the future.

Breakout Sessions

2:00 PM – 2:40 PM CT

The Lab at MSUFCU – Accelerating Innovation, Together

[ADD TO CALENDAR](#)



April Clobes

President/CEO, Michigan State University Federal Credit Union



Ben Maxim

Assistant Vice President, Digital Strategy & Innovation, Michigan State University Federal Credit Union

Michigan State University Federal Credit Union (MSUFCU) created their innovation center, The Lab at MSUFCU, to incubate and accelerate the crafting of innovative financial solutions through co-creation and partnerships. Hear about their experience in building “The Lab” and the lessons learned along the way. Learn how the engagement of members, employees, and fintech partners is essential to the innovation process.

Breakout Sessions

2:00 PM – 2:40 PM CT

Making Strategic Choices for Growth

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Thomas Munley

Vice President, Sales,
CUNA Mutual Group

Like many other financial services incumbents, credit unions are facing serious headwinds, including the ongoing impact of the COVID-19 pandemic, competition from non-traditional players, and changing consumer preferences. Hear the latest research on credit union growth strategies and how they relate to performance. Learn how credit unions' strategic choices including mergers, product mix, digital capabilities, and other areas of competitive advantage were linked to loan and membership growth and ROA before and during the pandemic. Examine how top performers' strategic choices differed from those of less successful credit unions, and review how those choices are evolving to continue driving growth and performance in the wake of the pandemic.

Preparing for Marketing Success in a Post COVID-19 World

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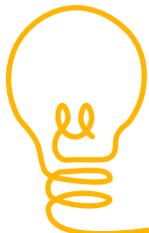
Joe Sullivan

President/CEO,
Market Insights

The social and economic impact of the coronavirus pandemic is a jarring example of how one crisis, one new trend or one new technology can turn your marketing, and your financial institution, upside down. Only the creative, agile marketer will be able to help their institution stay competitive and connected. Explore emerging consumer behaviors and marketing trends and discover three ways to keep your marketing less susceptible to emerging threats in the future.

This session is designed to inspire innovative thinking and help financial institution marketers:

- Identify the consumer behaviors that have changed due to the crisis
- Adjust their approach to marketing technology and messaging to align with new consumer behaviors
- Reimagine the role of marketing in the new normal



Breakout Sessions

2:00 PM – 2:40 PM CT

A Strategic Imperative: Your Members' Financial Health & Well-Being

ADD TO CALENDAR



Gigi Hyland

Executive Director, National
Credit Union Foundation



Sarah Lietz

Chief Experience Officer,
MEMBERS Development
Company (MDC)



Brenton Peck

Director, Program,
Financial Health Network

We've learned during the pandemic that health and wealth are deeply intertwined. A worldwide pandemic pulled the rug out from under people's financial lives. Looking forward, employees, members and communities need credit unions more than ever. Gain insights, including:

- How a financial well-being strategy is good for your community, members, employees – and your bottom line
- Putting financial health and well-being at the center of your strategy:
 - If you're new to this journey, learn about measuring your members' financial health and what to do with the information
 - If you've been on this journey a short while, learn about integrating financial well-being in everything you do
 - If you've been on this journey for years, learn about leveraging emerging tech to deepen member engagement and financial well-being

Closing Keynote

3:00 PM – 4:00 PM CT

Get Big Things Done: Unleash Your Connectional Intelligence

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Erica Dhawan

Founder/CEO, Cotential

We typically associate success and leadership with smarts, passion, and luck. However, in today's hypercompetitive world, even those gifts aren't enough. What is the game-changer? A thoroughly modern skill called Connectional Intelligence (CxQ). As radical as Emotional Intelligence was in the 1990s, Connectional Intelligence is turning people into super-connectors who accelerate innovation, break down silos and foster breakthrough top and bottom-line impact.

Understand the practice of using Connectional Intelligence as the key to professional success and leadership in the 21st century. Gain new insights and tools to accelerate the connected power of teams, your network, and connections to drive breakthrough collaboration and innovation.

Inspiration Stations

9:00 AM – 4:00 PM CT

Visit our five Inspiration Stations to chat with a subject matter expert and download the insightful, relevant content. Drop-in any time on August 12.



Rethinking Protection

To protect people, assets, and reputation; you must adapt business practices and implement risk mitigation strategies to be successful in an era of uncertainty. Join us to chat and review resources to assist you in keeping ahead of the complex array of ever-changing emerging risks.



Connecting with Multicultural Consumers, One Wink at a Time

Beginning the journey to better serve and connect with your multicultural members can be daunting, but we are here to guide you! In this booth, we share some key insights to help credit unions understand the importance of knowing the demographics of their membership and how implementing small “winks” can drive connection and growth.



Credit Union Success Stories

Learn from five credit unions as they share success stories of how they have evolved and grown over the last few years. From video banking, to core conversions, to branch modifications... you'll walk away with tips directly from your peers to bring back to your credit union.



AdvantEdge Digital

With a consumer-centric digital lending solution and real-time data analytics tools, AdvantEdge Digital – a CUNA Mutual Group company - helps credit unions close more loans with less friction and maximize financial performance. Our team of innovation-driven problem-solvers helps catalyze growth by understanding the needs of credit unions and their members—giving you everything you need to unlock your digital potential.



Bridging the Gap: The State of Fintech Partnerships

As new technologies rapidly transform the financial services landscape, financial institutions are increasingly partnering with fintech companies to help them innovate, grow and better serve their members. For many financial institutions, the process of identifying, evaluating and developing these partnerships can be a daunting challenge. CMFG Ventures, the venture capital arm of CUNA Mutual Group, is helping bring tomorrow's technologies to financial institutions today. This booth looks at some of the hottest fintech trends of 2021 and explores some of the unique ways financial institutions and fintechs work together.