



April 11-13, 2022 Omni Amelia Island Resort

Monday, April 11, 2022

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| 11:00 a.m. – 12:30 p.m. | Golf Event Registration & Lunch
Oak Marsh at Omni Amelia Island Resort |
| 12:00 p.m. – 5:00 p.m. | Best Ball Format Golf Event |
| 4:00 p.m. – 7:00 p.m. | Idea Institute Registration |
| 6:00 p.m. – 7:00 p.m. | Kick-off Reception |
| 7:00 p.m. | Dinner on Your Own |

Tuesday, April 12, 2022

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| 8:00 a.m. – 9:00 a.m. | Idea Institute Registration |
| 8:00 a.m. – 9:00 a.m. | Breakfast Available |
| 9:00 a.m. – 10:30 a.m. | TBD/Confirmed
Cinnamon Elliott, Chief Talent Officer, Dover FCU
\$609 Million, Dover, ME |
| 10:00 a.m. – 10:30 a.m. | Break |



10:30 a.m. – 12:00 p.m.



TBD/Empowering Ideas for Innovation

Brian Kaas, President and Managing Director, CMFG Ventures or Sam Das, Managing Director **(requested via Workfront and e-mailed Ann 1/30)**
Madison, WI

CUNA Mutual Group, a financially strong insurance company serving 95% of the U.S. credit unions for more than 80 years, invests in fintech and founded CMFG Ventures in 2016. CMFG Ventures is resource that offers a rare combination of start-up expertise and a deep knowledge of the financial services space—plus access to capital and resources—to help take great ideas to a whole new level. Hear about how the \$15 million Discovery Fund will support early-stage fintech companies led by BIPOC, LGBTQ+, and women founders over the next three years. And get updates on the \$200 million already invested in a mortgage advisor/blockchain-based marketplace, online consumer platform serving members and a marketing communications platform that sends personalized messages to members, driving engagement, sales and loyalty.

12:00 p.m. – 1:00 p.m.

Lunch Break

1:00 p.m. – 2:30 p.m.



TBD/Taking Lending to a New Level

Gary Hull, Assistant Vice President, Credit Union of America **(e-mailed 1/30, LM 2/1)**
\$1.3 Billion, Wichita KS

It was not easy and it sure was not overnight, but Credit Union of America has built a team that produces record breaking auto lending. They have become the #1 auto lender in Kansas. Hear how Hull's personal loan portfolio exceed 6,200 loans totaling \$103 million when the credit union operates in 40 of the state's 105 counties. It is about working non-traditional hours and meetings members' needs, stay innovative and implementing new technologies.

2:30 p.m. – 3:00 p.m.

Break

3:00 p.m. – 4:00 p.m.



TBD/Confirmed

Evelyn Royer, Vice President Operations and President/COO CU Channels, LLC, Purdue Federal Credit Union

5:00 p.m. – 6:30 p.m.

Networking Reception

6:30 p.m.

Dinner on Your Own

Wednesday, April 13, 2022

7:30 a.m. – 8:30 a.m.

Breakfast

8:30 a.m. – 10:00 a.m.



Credit Union Operations in the New Economy

Mike Schenk, Deputy Chief Advocacy Officer for Policy Analysis and Chief Economist, CUNA

Longstanding economic assumptions, relationships and metrics are less relevant today. The Fed's influence has eroded. Politics and the political climate have assumed increasing importance. Demographic shifts have accelerated. In an environment characterized by crisis, uncertainty and increasing complexity these trends are magnified. Disparities in member financial health have dramatically widened. Prospects for lending and general credit union operating results have improved but have fundamentally changed. Looking forward, credit union bottom-line results will likely be under significant pressure. In this session Mike will explore these themes and their implications in 2022 and beyond.

10:00 a.m. – 10:15 a.m.

Break

10:15 a.m. – 11:15 a.m.



Empowering Members for a Better Life

Robin Brulé, Senior Director, Philanthropic Partnerships, Filene

Helping members achieve better economic outcomes is what credit unions do every day - and why Brulé believes credit unions can play an even larger role in creating impact. With twenty plus years of experience in philanthropy and credit unions, Robin will share ideas on how to turn your not-for-profit organization into a for-impact organization. Learn how your credit union can accelerate economic impact for your member community, and minimize risk, while launching innovative loan programs designed for traditionally underserved borrowers to fund small businesses, pay off debt, or pursue education. Expand outreach, and change students' lives, through financial capability training with programs that impact students of all ages and contribute to increased graduation and retention rates.

Bios of Presenters

Mike Schenk

Deputy Chief Advocacy Officer for Policy Analysis and Chief Economist, CUNA

Mike Schenk has over 35 years of experience in the financial services industry. In 1992 he joined the Credit Union National Association (CUNA) – the largest and most influential national trade association advocating for America's credit unions. There are over 5,000 credit unions nationwide, with a total of more than 125 million memberships and \$1.9 trillion in assets.

Mike is Deputy Chief Advocacy Officer for Policy Analysis and Chief Economist for CUNA and conducts economic research and supports CUNA's public relations and advocacy efforts. His analyses regularly appear in trade publications such as Credit Union Magazine. He also is a frequent contributor to the financial media.

Schenk serves on the board of the Filene Research Institute, an independent, non-profit consumer and cooperative finance think tank. He also serves on the board of Summit Credit Union in Madison, Wisconsin – a \$4.5 billion financial cooperative with over 200,000 members. In his 18 years on the Summit board Mike has served as Board Chair and has Chaired the credit union's Asset-Liability Management and Risk Management/Internal Audit Committees.

Robin Brulé

Senior Director, Philanthropic Partnerships, Filene

With more than 25 years of community leadership experience, Robin Brulé joined the Filene team to elevate Filene's philanthropic partnership - approaches and cross-sector relationships. A fierce advocate for social justice with a strong track record engineering, piloting, and scaling holistic service programs, Robin is now with Filene and previously served on their Think Tank while at \$3 Billion Nusenda Federal Credit Union. She's also held positions as Chief Strategist for New Mexico Center for Philanthropic Partnerships, Executive Director of Central New Mexico Community College Foundation and Director of Development for University of New Mexico Children's Hospital during her more than 25 years of extensive community leadership. Robin holds a Bachelor's degree in Business Administration and Management from the University of Phoenix.

A true influencer, Robin has been passionate about building communities through every career opportunity she has held. She plans to strengthen Filene's ability to create cross-sector partnerships through philanthropy and ultimately, solve the complex problems facing credit unions and the communities they serve. Don't forget to ask Robin about how she brought her socially conscious childhood into the lives of her own children, how she accidentally became an actress in college, and how she ended up taking a ride in a submarine and then in a hot air balloon.

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