




**April 11-13, 2022** **Omni Amelia Island Resort**

## Monday, April 11, 2022

11:30 AM - 12:30 PM	<b>Golf Event Registration &amp; Lunch</b>	<b>Oak Marsh Golf Course</b>
12:30 PM - 5:00 PM	<b>Best Ball Format Golf Event</b>	<b>Oak Marsh Golf Course</b>
4:00 PM - 7:00 PM	<b>Idea Institute Registration</b>	<b>Amelia Foyer</b>
6:00 PM - 7:00 PM	<b>Kick-off Reception</b>	<b>Sunrise Cafe &amp; Terrace</b>
7:00 PM	<b>Dinner on Your Own</b>	

## Tuesday, April 12, 2022

8:00 AM - 9:00 AM	<b>Idea Institute Registration &amp; Breakfast</b>	<b>Amelia 2 &amp; 3 &amp; Amelia Foyer</b>
9:00 AM - 10:00 AM	<b>Investing in Your Most Important Asset</b> Cinnamon Elliott, Chief Talent Officer, Dover FCU \$609 Million, Dover, ME Dover FCU has made an investment in the ongoing development of its team members. This includes providing every employee—regardless of current role or tenure in the organization—with the opportunity to advance. It requires an ongoing commitment from every manager to engage in regular career development conversations with employees. This guide has been designed to help employees prepare for career path development conversations and to help managers or other organizational leaders support employees in the development they need to reach their career goals.	<b>Amelia 1</b>
		
10:00 AM - 10:30 AM	<b>Break</b>	<b>Amelia Foyer</b>
10:30 AM - 12:00 PM	<b>Growth Through Fintech Partnerships and Collaboration</b> Brian Kaas, President and Managing Director, CMFG Ventures Madison, WI CUNA Mutual Group, a financially strong insurance company serving 95% of the U.S. credit unions, has invested over \$220 million in fintechs since launching CMFG Ventures in 2016. CMFG Ventures brings a rare combination of start-up expertise and credit union knowledge to help take great ideas to a whole new level. During this interactive session, hear how CMFG Ventures is building a community uniting financial institutions, fintechs, and industry partners to foster innovation, share knowledge and discuss topics impacting the future of financial services. Also, learn how credit unions are partnering with fintechs to accelerate growth, increase engagement, grow membership, and enhance member experiences. Finally, see how the CMFG Ventures Discovery Fund is supporting early-stage fintech companies led by BIPOC, LGBTQ+, and women founders to help expand financial inclusion within the credit union system.	<b>Amelia 1</b>
		
12:00 PM - 1:00 PM	<b>Lunch</b>	<b>Amelia 2 &amp; 3</b>

1:00 PM - 2:30 PM



**Member-Centered Design for Growth & Digital Engagement**

**Amelia 1**

Sumeet Grover, SVP, Chief Digital & Marketing Officer, Alliant CU  
\$15 Billion, Chicago, IL

Alliant Credit Union is the largest credit union in Illinois and one of the largest in the nation, with over \$15Bn in assets. Alliant’s excellent online, mobile and phone banking services, make banking simpler for our 600,000+ members nationwide. Alliant has always served members nationwide, prioritizing simple and innovative digital experiences. In 2022, Alliant has been recognized among the very best financial institutions, including Bankrate’s Best Credit Unions of 2022, Nerdwallet’s Best Checking & Savings Combo, and Forbes’s Best Checking Accounts for Digital Banking 2022. Digital technologies are impacting every aspect of our lives, and we have to transform and adapt to meet our members needs. Human-centered design lets you better understand members needs, motivations, and concerns, and it also provides a more efficient and flexible design process. During this interactive session hear how Alliant is focused on member-centered design, resulting in strong membership growth and sustained digital engagement to meet our members needs and expectations.

2:30 PM - 3:00 PM

**Break**

**Amelia Foyer**

3:00 PM - 4:00 PM

**How One Credit Union Improved Member Relationship and Experience through Innovative Initiatives**

**Amelia 1**



Evelyn Royer, CPA, Vice President Operations, Purdue Federal Credit Union  
\$1.7 Billion, West Lafayette, IN

Learn how one credit union built and maintains an innovative culture. Innovation is more than just creative brainstorming sessions. The most important part of innovation is the implementation that drives real growth. Evelyn will share case studies of programs at Purdue Federal Credit Union around engagement with their members and community partners that has:

- Deepened member relationships
- Increased services per member
- Driven transaction growth
- Improved the digital experience

5:00 PM - 6:30 PM

**Networking Reception**

**Sunrise Cafe & Terrace**

6:30 PM

**Dinner on Your Own**

**Wednesday, April 13, 2022**

7:30 AM - 8:30 AM

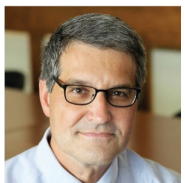
**Breakfast**

**Amelia 2 & 3**

8:30 AM - 10:00 AM

**Credit Union Operations in the New Economy**

**Amelia 1**



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

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 AM - 10:15 AM

**Break**

**Amelia Foyer**

10:15 AM - 11:15 AM

**Empowering Members for a Better Life**

**Amelia 1**



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.

## **Cinnamon Elliott, Chief Talent Officer, Dover FCU, \$609 Million, Dover, ME**



Cinnamon Elliott, MBA, CCUE is the Chief Talent Officer at Dover Federal Credit Union. She has been employed with Dover Federal for 16 years. Cinnamon started her career with the credit union as a teller, which is when she decided that she wanted to continue a career in finance. Cinnamon elected to remain working at the credit union because of the “people helping people” philosophy. She has a passion to help people in my local community to make financially sound decisions and makes a positive difference and their financial life.

Cinnamon has operated in various positions including Branch Manager, Director of Sales and Service, and Culture and Engagement Manager. While working at the credit union, Cinnamon completed her MBA at Wilmington University with a concentration in Organizational Leadership, received her Certified Credit Union Executive designation from CUNA Management School, and was a recipient of the Delaware Business Times Top 40 under 40 award in October 2021. As an active member of her community, she as served on various boards and committees.

As a member and representative of Dover Federal Credit Union, her goal is to make a positive and lasting impression on the members of our local community; to provide financial education and plans for those in need. Cinnamon has a personal goal to influence youth with an understanding and preparation for a life that will have a positive impact on their financial choices.

## **Brian Kaas, President and Managing Director, CMFG Ventures**



Brian Kaas is President and Managing Director of CMFG Ventures, LLC and oversees all aspects of CUNA Mutual’s venture capital program. Additionally, Kaas serves as the Senior Vice President of Corporate Development at CUNA Mutual Group where he has led the acquisition of numerous companies. He serves as a board member for several fintech companies and is a frequent speaker on emerging fintech trends. Kaas joined CUNA Mutual Group in 2012.

Prior to joining CUNA Mutual Group, Kaas was a partner at the national law firm of Foley & Lardner where he handled a broad range of complex strategic transactions, mergers, acquisitions, and corporate restructurings.

## **Sumeet Grover, SVP, Chief Digital & Marketing Officer, Alliant CU**



Sumeet leads digital, marketing and member care functions. He is responsible for enterprise-wide digital and marketing strategies, digital product management, digital innovation and transformation, relationship expansion, marketing, acquisitions, brand, public relations, communications, banking operations, contact center, digital care, and member services. Prior to joining Alliant as CDMO, Sumeet held several leadership roles at Citi. He has a Bachelor’s degree in life sciences, Master’s in business management, and has extensive experience in marketing, digital, analytics, client experience, operations and technology.

## **Evelyn Royer, CPA, Vice President Operations and President/COO CU Channels, LLC, Purdue Federal Credit Union, \$1.7 Billion, West Lafayette, IN**

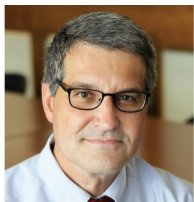


Evelyn Royer joined Purdue Federal Credit Union in 1994 as the Internal Auditor. She has led the Accounting Department and subsequently developed the Risk Management Department. Today she oversees the majority of the credit union’s support departments like Loan Services, Payment & Deposit Operations as well as Loss Mitigation, Financial Wellness and Fraud Prevention. She is a licensed CPA and has been certified by the Credit Union National Association (CUNA) as a Credit Union Compliance Expert. She is currently involved in local organizations such as the United Way of Greater Lafayette and Lafayette Transitional Housing Center as well as state and national advisory boards with the Indiana Credit Union League (ICUL) and CO-OP Financial Services. From an innovation perspective, she has

was an inaugural member of Indiana’s ignite group as well as former Filene i3 innovator tasked w/ developing solutions to address consumer and credit union challenges.

Personally, Evelyn is married to her husband Scott and have raised two beautiful young ladies in their early 20s. As an aside, both girls have graduated or going to graduate from Indiana University, the arch rival of the Purdue Boilermakers.

## 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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