

SOUTHEAST LEADERSHIP

 Development Conference

August 31 - September 2, 2022

The Grand Hotel Golf Resort & Spa

Point Clear, AL



Wednesday, August 31

6:30 AM - 7:00 AM Southeast Credit Union Foundation (SECUF) Charity Golf Tournament Registration *Lakewood Front Lawn*

7:00 AM - 8:00 AM Southeast Credit Union Foundation (SECUF) Charity Golf Tournament Breakfast *Lakewood Front Lawn*

8:00 AM - 12:00 PM Southeast Credit Union Foundation (SECUF) Charity Golf Tournament/Shot Gun Start *Azalea Golf Course*

9:00 AM - 5:30 PM Welcome Center/Registration Open *Sponsored by*  *Grand Ballroom Foyer*

9:00 AM - 2:00 PM Exhibitor Registration *Sponsored by* 

Lunch On Your Own

2:00 PM - 3:00 PM **Breakout Session**
Recruiting and Retaining an Engaged Workforce *Azalea AB*
Dr. Melissa Furman, MS, DBA, Founder/Consultant, Career Potential, LLC



As the workforce becomes more diverse, organizational leaders are challenged with employing successful recruitment and retention strategies. This session contains audit exercises to assess your current recruitment and retention practices and provides practical tactics for recruiting and retaining a diverse, engaged workforce.

2:00 PM - 3:00 PM **Breakout Session**
A Crash Course in CU Management: The Playbook for 2023 and Beyond *Azalea C-F*
Ancin Cooley, CIA, CISA, Founder and Principal of Synergy Credit Union Consulting, Inc.



The credit union game is changing and the strategies that got us to this point are no longer viable options. In this timely session, Ancin Cooley with Synergy Credit Union Consulting will give you a peek inside the playbooks of some of the most successful credit unions in the US.

2:00 PM - 3:00 PM **Breakout Session** *Beachside*
Cryptocurrency 101



David Pace, Manager of Regulatory Advocacy, LSCU & Affiliates
In Cryptocurrency 101 David Pace will be explaining the basics of what cryptocurrency is, how it is being used and how it is changing the financial landscape. This session is for all those who know very little about cyptocurrency and are looking to get the foundational knowledge they need to start exploring it.

2:00 PM - 3:00 PM **Breakout Session** *Grand Ballroom South*
The Fed at a Crossroads: Investment Strategies for a Fed Tightening Cycle and a Turbulent Economy



Seth Kellicut and Bryan Bell, Credit Union Investment Strategy Group of Oppenheimer & Co Inc.
We are in the middle of a FED tightening cycle, the pace of which we haven't seen in many years. Why is the FED so relentless in their Interest Rate decisions? Can they continue their path given the path of the economy? How will this impact the financial/investment decisions for my credit union? What can we do now to prepare for the remainder of 2022 and beyond? The goal of this forum is to help relieve some of the market anxiety Credit Unions are experiencing. We will provide a practical discussion, sharing our experience and perspective on ready to use strategies that are applicable regardless of how rates fluctuate due to the FED's choices.

Considerations:

- What is the FED going to do?
- Loan demand is up, but liquidity is starting to get tight.
- What impact will raising COF have on my CU? Net Interest Margin under pressure...
- Continued volatility in yields... Are yields going higher or lower?
- What investment opportunities provide enough flexibility to provide performance and peace here at the crossroads

Sponsored by  OPPENHEIMER

Wednesday, August 31 (continued)

3:00 PM - 3:30 PM

Break

3:30 PM - 4:30 PM



Breakout Session

Azalea C-F

Get to the Point: How to Identify, Sharpen, and Champion Your Most Important Ideas

Joel Schwartenberg, Presentation Coach

Many professionals—from students to salespeople to CEOs—deliver speeches, share presentations, and contribute ideas, but few make truly meaningful points. Why? Because speakers often confuse sharp points with broad topics, themes, categories, and titles. Not identifying clear points renders a communicator pointless, which is the biggest cause of rambling, audience disengagement, and client disconnection. Employing humor and audience participation, this unique presentation provides actionable tips, exercises, and practice opportunities that help professionals not just become stronger public speakers but more effectively champion their points, whether selling products, services, or ideas.

- How to identify, sharpen, and effectively sell a point
- How to use “Power Periods,” volume, and pauses to enhance points
- How to convey points more effectively in video meetings and PowerPoint presentations
- How to start and finish with confidence and impact
- How to tell stories in a way that helps deliver points, not distract from them
- How to overcome public speaking anxiety

3:30 PM - 4:30 PM



Breakout Session

Grand Ballroom South

Contact Center - Improve Member Experience and Security without Compromises

Dr. Milind Borkar, Founder & CEO, Illuma

An exploration of the challenge with meeting expectations for streamlined, welcoming credit union contact center interactions, the current threat landscape for fraud/account takeovers, and how to balance risk mitigation with member experience.

3:30 PM - 4:30 PM



Breakout Session

Azalea AB

Improving Adaptability, Grit, and Resiliency to Maximize Performance

Dr. Melissa Furman, MS, DBA, Founder/Consultant, Career Potential, LLC

As the workplace continues to change at an accelerate pace and younger generations enter the workforce, skills such as adaptability, grit, and resiliency will be critical for future success. This session will provide practical techniques and tools for enhancing your own adaptability while also leading and developing adaptability in others.

sponsored by  **CorporateAmerica**
CREDIT UNION

5:00 PM - 6:30 PM

Exhibit Hall Grand Opening Reception sponsored by  **CUNA MUTUAL GROUP**

Magnolia Ballroom

Dinner On Your Own

Thursday, September 1

7:45 AM - 3:00 PM

Welcome Center/Registration Open

Grand Ballroom Foyer

7:45 AM - 8:30 AM

Breakfast sponsored by  **CorporateAmerica**
CREDIT UNION

Azalea Ballroom

8:30 AM - 10:00 AM

Welcome and Introduction

Grand Ballroom North

Samantha Beeler, President, LSCU & Affiliates

Opening General Session

Inspiring a Relatable Workforce

Rachel DeAlto, Relationship and Communications Expert, Media Personality and Consultant

Zoomed in. Checked out. Engaging and connecting a far-flung workplace and is on the top of every company's to-do list. Or, at least, it should be, because whenever teams feel overwhelmed, under-served, and misunderstood, the wheels start to come off the bus. Productivity goes down, sick days go up, great employees jump ship, and morale descends into a gut-wrenching spiral. Connect your teams to the most powerful tool they have for finding happiness, meaning, productivity, and success: each other.

Connect your teams to the most powerful tool they have for finding happiness, meaning, productivity, and success: each other.

In this keynote, relationship expert and relatable author Rachel DeAlto will show you how to inspire an energized workforce that happily engages, collaborates, innovates, and thrives—no matter where they work. The world has changed. Work has changed. Is your organization ready?

sponsored by  **deluxe**

Thursday, September 1 (continued)

10:00 AM - 10:30 AM

Break sponsored by **deluxe**.

10:30 AM - 11:30 AM

CEO Roundtable (All Asset Sizes) - Facilitated by Samantha Beeler

Beachside

10:30 AM - 11:30 AM

Directors Roundtable - Facilitated by Sydney Seral & Allison Allen

Azalea AB

10:30 AM - 11:30 AM

Breakout Session

Azalea C-F



Connecting Consumers to Credit Unions: Raising Awareness & Engagement

Chris Lorence, Executive Director of CU Awareness, LLC

Credit Union Awareness® delivers the movements only national, and state-level digital consumer marketing program designed to generate consideration and engagement for credit unions. Since April 2022, over 650K consumers in Alabama, Florida and Georgia have visited YourMoneyFurther.com to learn about and ultimately locate a credit union they can potentially do business with. In this session, we'll share more about how the program works, how participating credit unions can connect their website for maximum consumer engagement opportunities and we'll provide insights for how credit unions can harness the insights of the program to improve their own digital marketing efforts.

11:45 AM - 1:15 PM

Advocacy Lunch

Grand Ballroom North



Katie Boyd Britt, Republican Nominee for U.S. Senate

Representative Chip Brown (R-Hollinger's Island)

Representative Alan Baker (R-Brewton)



1:30 PM - 2:30 PM

Breakout Session

Azalea AB

Alabama Credit Union Administration Regulatory Panel

Greg McCellan, Administrator, Alabama Credit Union Administration

Jeff Russell, Bank Examinations Coordinator, Alabama Credit Union Administration

Greg McClellan, Administrator, Alabama Credit Union Administration, and Jeff Russell, Bank Examinations Coordinator, Alabama Credit Union Administration will give a presentation on current Alabama state regulatory issues for credit unions and take questions from the audience.



1:30 PM - 2:30 PM

Breakout Session

Azalea C-F

Relatable Workforce

Rachel DeAlto, Relationship and Communications Expert, Media Personality and Consultant

Take a deeper dive into what it means to create a relatable workplace. Drawing from Rachel DeAlto's proprietary personality assessment, attendees will learn their social superpower, their relatability index, and how to use that knowledge to connect more effectively with their teams and members. Creating a relatable workplace is about much more than being friendly or approachable, it's about fully understanding and customizing your interactions with each person you encounter. This session will assist leaders in enhancing their capacity to connect with people, develop better connections, and establish a more supportive workplace.



1:30 PM - 2:30 PM

Breakout Session

Beachside

Purpose, Productivity, and Progress: The New Blueprint for Career Fulfillment

Ancin Cooley, CIA, CISA, Founder and Principal of Synergy Credit Union Consulting, Inc.

Purpose drives productivity. Productivity drives progress. In this uplifting session, Ancin Cooley with Synergy Credit Union Consulting, will discuss strategies how to reach your financial goals without sacrificing your personal mission and values.



2:30 PM - 2:45 PM

Break

2:45 PM - 3:45 PM

General Session

Grand Ballroom North

Options for Fee Income Panel

Facilitated by Sydney Seral

Becky Summers, Raddon, Thought Leadership and Strategic Insights

Cheryl Lawson, Executive VP of Compliance Review, JMFA

Greg Olmsted, President/CEO, North Alabama Educators Credit Union



Thursday, September 1 (continued)

4:00 PM - 6:00 PM

Exhibit Hall Reception sponsored by  Safe Systems®

Magnolia Ballroom

8:00 PM - 10:00 PM

Endless Summer: Sweets, Spirits, and Summer Sounds Party

Grand Ballroom Patio

sponsored by  CorporateOne

Southeast Credit Union Foundation (SECUF) Wine & Whiskey Ring Toss

Friday, September 2

8:00 AM - 9:00 AM

Breakfast

Grand Ballroom South

8:00 AM - 9:00 AM

Welcome Center/Registration Open

Grand Ballroom Foyer

9:00 AM - 10:30 AM

General Session

Grand Ballroom North



A Chance of Awesome: How Changing the Way You See Changes Everything

Jason Kotecki, Artist, Author & Speaker

Sometimes in life, you just feel...stuck. When you're stumped by a seemingly unsolvable challenge, sometimes all you need is a little nudge from an outsider with a fresh perspective, someone who points out the answer that was there the whole time. This presentation is that little nudge, and a great fit for organizations experiencing transition or in a season of intense change. You'll learn how to recognize opportunities in road blocks and how to see dead ends as new beginnings. Because the difference between success and failure is not luck, it's looking at your world in a whole new way! So come ready to spark some new ideas - and grab onto them.

Thank you to our Sponsors!



SPEAKERS



Representative Alan Baker (R-Brewton)

Representative Alan Baker was elected to the Alabama House of Representatives in 2006. He was born in Brewton on July 15, 1956, graduated from T.R. Miller High School in Brewton, received an A.A. degrees from East Central Community College in Decatur, Mississippi and received his B.S. degree from Auburn University in 1978 with a major in history and a minor in political science.

Representative Baker devoted 27 years to public education, first as a teacher-coach in Phenix City, and later returning home to Brewton where he taught history and coached football and track at T.R. Miller High School. During his tenure as coach, Representative Baker amassed 10 state championships, five for football and five for track. For his accomplishments, he was honored by being selected and inducted into the Alabama High School Athletic Association Sports Hall of Fame in 2008. he currently lives in Chicago, IL.



Ancin R. Cooley, CIA, CISA, Principal, Synergy Credit Union Consulting

Ancin Cooley, CIA CISA, is the Founder and Principal of Synergy Credit Union Consulting, Inc. Synergy helps credit unions grow and thrive by helping them manage risk, increase profits, and help members. Synergy accomplishes this through a suite of services that includes Director Training, Strategic Planning, Enterprise Risk Management, Internal Audits, and Regulatory Compliance Reviews. As principal, Ancin manages a growing portfolio of clients throughout the United States and Caribbean. He brings more than 20 years of experience to the financial services industry. Ancin honed his skills while working with the US Treasury Dept. At the Treasury, he performed examinations for financial institutions ranging from \$1 million to \$8 billion in total assets. After leaving the Treasury Dept. Ancin worked for a regional accounting firm where he led internal audits, as well as loan and pre-regulatory examination reviews.

When not advising clients, training for triathlons, or spending time with his family, Ancin designs and conducts trainings for the Credit Union industry. In addition, he is a well sought-after expert contributor to a host of financial publications. He has most recently been featured in Forbes Magazine and the Credit Union National Association. Ancin is originally from New Orleans, LA. But he currently lives in Chicago, IL.



Becky Summers, Thought Leadership & Strategic Insights, Raddon

Laura Vann has more than 30 years' experience working with not-for-profit organizations in member relations, business development, communications, training, and fund-raising positions. Currently, Laura serves as Senior Director, Shared Branching at Shared Cooperative Services. In this role, she facilitates cooperation among Alabama and Georgia credit unions in the development and operation of the shared branching network; develops and executes strategies to increase the number of credit union members with access to shared branching; and conducts training on shared branching rules and regulations.

Laura joined the League staff in 2001 and previously focused on increasing the value League membership, helping credit unions develop growth strategies, building a stronger chapter system, and developing financial education initiatives. During her career, she has facilitated over 180 strategic planning sessions for credit unions with assets ranging from \$2 billion to \$1 million. She graduated from The University of Alabama at Birmingham, with a major in English and a minor in Communications. Laura completed the National Credit Union Foundation's Credit Union Development Educator program in 2012.



Bryan Bell, Group Analytical Associate, Credit Union Investment Strategy Group of Oppenheimer & Co Inc.

Bryan Bell is a Group Analytical Associate for the Credit Union Investment Strategy Group of Oppenheimer & Co. Inc. ("Oppenheimer") in the East Lansing, MI office. His primary responsibility is to support the Credit Union Group in the day-to-day operations and growth of the Credit Union business. Bryan holds his FINRA Series 7 and Series 66 registrations. Bryan assists the Group with prospecting, onboarding new clients, developing and maintaining client relationships; monthly wiring of principal and interest, and works with the Group implementing the marketing plan and hosting educational forums. Bryan also works with the partners of the Group to formulate and implement investment strategies tailored to their client's needs.

He joined The Credit Union Investment Strategy Group of Oppenheimer in 2018 from Mercantile Bank of Michigan, where he was a Commercial Loan Specialist. In this position, he was the central liaison for the lenders, responsible for maintaining an appropriate LTV as loans were paid down/off and arranged for the release of the collateral securing the original loan.



Cheryl Lawson, Executive VP of Compliance Review, JMFA

Cheryl joined JMFA in 2001, rising quickly from consultant to engagement manager to executive vice president of implementation. Today she serves as EVP of Compliance Review for overdraft privilege, ensuring the fulfillment of all regulatory requirements. Her responsibilities also include high-level sales support and administration for financial institutions. Cheryl is also a sought-after authority for compliance issues related to overdraft programs. She continues to be invited to speak at numerous industry events.

Cheryl's impressive background includes more than 30 years of experience in global information technology and financial operations, as well as consulting, communications, training, and project management. The Houston native earned her bachelor's in English from Carnegie-Mellon University, followed by an MBA from Rice University.



Representative Chip Brown (R-Hollinger)

Rep. Brown was elected to the House of Representatives in 2018. He served on local and state Republican Executive Committees and on the staff for the former Speaker of the Alabama House Jimmy Clark. Brown's district covers the southern most portions of Mobile County, including Dauphin Island. He resides on Hollinger's Island with his wife, Aimee and their son. Rep. Brown is Mobile County's only legislator holding a seat on the House Insurance Committee. There Brown has sponsored legislation and promoted policies intended to lower insurance premiums for Gulf Coast residents. He also serves on the House Economic Development and Tourism, Urban and Rural Development, and Mobile County Legislation committees.



Chris Lorence, Executive Director of CU Awareness, LLC

Chris Lorence is Executive Director of CU Awareness, LLC, a wholly owned subsidiary of the Credit Union National Association (CUNA). Lorence raises consumer consideration and membership opportunities for credit unions through the nation's only digital consumer engagement program. Lorence brings more than twenty-five years of leadership, marketing, engagement, and innovation strategy to Credit Union Awareness.



David Pace, Manager of Regulatory Advocacy, LSCU & Affiliates

David Pace graduated from Georgia State University in 2020 with a Bachelor of Business Administration with a concentration on Finance. While in college he worked for Associated Credit Union as a Risk Management Assistant. After graduating he got a job with the Nebraska Department of Banking and Finance as a FinTech Examiner who specialized Money Service Businesses and cryptocurrency companies. He is now the Manager of Regulatory Advocacy with LSCU.



Greg McClellan, Administrator, Alabama Credit Union Administration

Greg McClellan is a native of Alexander City, AL. He holds a BS in General Business and a MBA from Auburn University. He is also a graduate from the School of Banking, Bank Administration Institute, at the University of Wisconsin in Madison, WI. Greg began his career working with a bank holding companies, serving as Chief Internal Auditor and as Vice President of Operations and Personnel.

In 1984, Greg joined MAX Credit Union and served MAX and its members for over 34 years, retiring as CEO in June 2019. After his retirement of one week, Greg entered the position of Administrator of the Alabama Credit Union Administration.



Greg Olmsted, President/CEO, North Alabama Educators Credit Union

Greg Olmsted is President/CEO with North Alabama Educators Credit Union, \$133 Million in Assets. He has worked 36 years in the credit union industry including prior service with Rocket City Federal Credit Union and Redstone Federal Credit Union. B.S Degree in Management/Finance from the University of Alabama in Huntsville.



Jason Kotecki, Artist, Author & Speaker

Jason Kotecki is a professional reminder-er and permission granter who moonlights as an artist, author and professional speaker. Jason and his wife Kim have made it their mission in life to help people and organizations break free from Adultitis to build better lives, businesses, and teams.

As a speaker, Jason works with organizations to beat burnout and become more innovative by breaking rules that don't exist. He is recognized by the National Speakers Association as a Certified Speaking Professional® (CSP). Only the top 10% of speakers in the world have this designation, which is the profession's highest earned international measure of platform competence. CSPs are held to the highest ethical standards, and bring a proven track record of expertise and excellence.



Jeff Russell, Bank Examinations Coordinator, Alabama Credit Union Administration

Jeff holds a B.S. Business Administration / Finance & Economics from the University of South Alabama and Auburn University Montgomery. He has 21 years' experience in the credit union regulatory arena with the state of Alabama plus 3 years with the National Credit Union Administration (NCUA). In addition, he has roughly 9 years of experience serving in various positions, including collections, commercial lending, branch management, and credit review, in the banking, credit union, and financial services industry. He is also a NASCUS Certified State Credit Union Supervisor.



Joel Schwartenberg, Presentation Coach

Joel Schwartenberg is the Senior Director of Strategic and Executive Communications for a major nonprofit in New York City and also teaches communication and presentation skills to clients including American Express, State Farm Insurance, Blue Cross Blue Shield, Comedy Central, and the Brennan Center for Justice. Joel's books include "The Language of Leadership: How to Engage and Inspire Your Team" and "Get to the Point! Sharpen Your Message and Make Your Words Matter"

and his articles appear in Harvard Business Review, Fast Company, CNBC, Inc.com, and Toastmaster Magazine. A frequent conference presenter and workshop leader, Joel is also a former national champion public speaker and collegiate speech coach.



Katie Boyd Britt, Republican Nominee for U.S. Senate

Katie began her career after graduating with a degree in political science from The University of Alabama, where she was student body president. After graduation, she worked in Washington, D.C., as U.S. Senator Richard Shelby's deputy press secretary, quickly rising to become press secretary. Katie went on to serve as special assistant to then-University of Alabama President Robert Witt.

After earning her law degree from The University of Alabama School of Law, she practiced law at the Alabama-based firm Butler Snow LLP.



Dr. Melissa Furman, MS, DBA, Founder/Consultant, Career Potential, LLC

Dr. Melissa Furman's passion for guiding individuals with career, professional, and leadership development inspired her to launch Career Potential to help individuals achieve and organizations succeed. As the owner of Career Potential, Dr. Furman delivers highly engaging sessions at state, national, and international conferences in addition to providing consulting and training services.

Dr. Furman served as the assistant dean and currently serves as a faculty member at the James M. Hull College of Business at Augusta University in Augusta, Georgia. She also serves as an affiliate faculty member for the Professional Education division at GA Tech and the Kenan-Flagler Executive Education division at UNC-Chapel Hill. Dr. Furman has previously served in a variety of roles at other universities such as Emory University, The University of Georgia, and Johns Hopkins University. She obtained her Doctorate of Business and Masters of Science in Professional Counseling from Georgia State University and her Bachelor of Arts degree in Psychology from Susquehanna University.



Dr. Milind Borkar, Founder and CEO, Illuma

Dr. Milind Borkar is the Founder and CEO at Illuma, a CUSO specializing in real-time voice authentication and fraud prevention solutions for credit unions. The flagship product, Illuma Shield™, replaces traditional knowledge-based authentication practices with an effortless and secure voice biometric solution. The net result is an elevated member experience, enhanced security, and improved operational efficiency. Illuma Shield™ has been showcased at multiple premier fintech events such as FinovateSpring and FinovateFall. Illuma Shield™ has won Best in Show at VentureTech 2019, the CreditUnions.com 2022 Innovation Series Award in the Member Experience category, and the 2022 NACUSO Next Big Idea Award. Illuma is the exclusive provider for CUNA Strategic Services and has industry endorsements in 34 U.S. states.

Prior to Illuma, he received his Ph.D. in Electrical and Computer Engineering from the Georgia Institute of Technology in 2008, after which he worked at Texas Instruments in roles spanning R&D, Marketing, and Business Development. He has launched 50+ hi-tech products, is an inventor on 21 patents, and an author on 14 technical publications.



Rachel DeAlto, Relationship and Communications Expert, Media Personality and Consultant

Rachel DeAlto is a relationship expert, media personality, and speaker. She is the author of “relatable: How to Connect with Anyone Anywhere (Even if It Scares You)” (Simon & Schuster’s Tiller Press, Fall 2021). Rachel has appeared as a relationship expert on Lifetime’s Married at First Sight and TLC’s Kate+Date. Rachel DeAlto maintains a law degree, a Master’s in psychology, and an influential social media presence, engaging and inspiring over 150,000 active followers over her platforms.

In addition to her regular appearances, Rachel has also been featured on a multitude of media outlets including The TODAY Show, Access Hollywood Live, and Fox News. She has also given three TEDx talks including Being Authentic in a Filtered World which is featured on TED.com.



Samantha Beeler, President, LSCU & Affiliates

Samantha Beeler serves as President of the LSCU & Affiliates. She previously served as Vice President of Advocacy for the Northwest Credit Union Association (NWCUA) which is the regional trade association for credit unions in Washington, Oregon and Idaho. In her role, Samantha is responsible for advocacy, compliance, legal and member engagement. Prior to working for the NWCUA, she led communications for a Government Contracts Practice group in Washington, D.C.

Samantha grew up in Alabama and lived in Georgia. Samantha received her bachelor’s degree in Social Science from Washington State University and also did an emersion program in International Relations at Peking University in Beijing, China. She has participated in Executive Education at Harvard’s Kennedy School of Government.



Seth Kellicut, Group Marketing Associate, Credit Union Investment Strategy Group of Oppenheimer & Co Inc.

Seth Kellicut is a Group Marketing Associate for the Credit Union Investment Strategy Group of Oppenheimer & Co Inc (Oppenheimer) in the East Lansing, MI office. The Group of fixed income professionals provides comprehensive investment strategies and recommendations to help credit unions meet their financial objectives. Seth’s primary responsibilities include supporting the Credit Union Group in marketing and business development. He also assists the group in credit union and investment analysis, client strategy and relations, and hosting educational forums. Seth holds his FINRA Series 7 and Series 66 registrations.

Seth Graduated with a Bachelor of Science in Financial Management from Hillsdale College where he also played on the football team and was a member of the Investment Club. While in School, Seth gained his first experience in financial management while working as an intern at Stifel Financial Corp.