



Hotel:

The Westin Birmingham
2221 Richard Arrington Jr Blvd N
Birmingham, AL 35203



Credit Union Learning Journey:

Alabama CU – Tuscaloosa (*group bus transportation will be provided*)
401 University Blvd East
Tuscaloosa, AL 35401



Meeting Location on Saturday, April 27, 2024:

AmFirst CU
1200 4th Ave N
Birmingham, AL 35203



Friday, April 26, 2024

11:00am – 12:15pm	Registration / Check-in / Box Lunches Provided	AmFirst
12:30pm – 1:30pm	Travel to Alabama CU – Tuscaloosa	AmFirst
1:30pm – 1:45pm	Welcome (LSCU Introduction / Housekeeping items / Alabama CU Thank You) & Kick Off- Kelly Yager, BSACS, Member Engagement Consultant. Nate with Corporate America will share a welcome message with our Credit Unions	Alabama CU
1:45pm – 2:30pm	Reflections on a Lifelong Credit Union Career Steve Swofford, President / CEO, Alabama CU	Alabama CU
2:30pm – 3:30pm	Snack / Networking Break / Campus Tour	Alabama CU
3:30pm – 4:00pm	CU Advocacy for YPs Michelle Roth, CAE, Senior Director of Governmental Affairs, League of Southeastern Credit Unions & Affiliates	Alabama CU
	<p>Advocacy for Young Professionals (YPs) within credit unions (CUs) is critical for ensuring the sustainability and growth of the industry. Here are some key points that will be covered:</p> <ul style="list-style-type: none">• How to stay informed about legislative and regulatory changes impacting the credit union industry.• Keeping abreast of industry trends, challenges, and opportunities through participation in conferences, webinars, and networking events.• It is important to note that YPs bring fresh perspectives, innovative ideas, and technological expertise to the credit union movement.• Advocacy helps protect the interests of credit unions and their members by influencing policies that impact the financial services industry.• Active involvement in advocacy enhances professional development by providing opportunities to build leadership skills, expand networks, and contribute to the collective voice of the credit union movement.	
4:00pm – 4:55pm	Alabama CU Executives Panel June Landram, Chief Operations Officer; Benson Bolling, Chief Lending Officer; Brandi McKinney, VP Compliance & HR; Kelley Porter, VP Member Experience	Alabama CU
5:00pm – 6:00pm	Depart Alabama CU / Travel back to AmFirst and Hotel	
6:00pm – 6:30pm	Break for Hotel Check In	The Westin Birmingham

6:30pm – 8:00pm

Cocktail Reception / Heavy Hors d'oeuvres

The Westin Birmingham

Saturday, April 27, 2024

7:30am – 8:15am	Registration / Check in / Breakfast	AmFirst CU
8:15am – 8:30am	Welcome Susan Lee, BSACS, CCUF, CCUFC, Member Engagement Consultant, League of Southeastern Credit Unions & Affiliates & Alex Lawley, AmFirst Credit Union	AmFirst CU
8:30am – 9:30am	Steps to Effective Communication Jessie Bono, Strategic Marketing and Business Manager, Bono Communications & Marketing, LLC	AmFirst CU
9:30am – 9:45am	Break	AmFirst CU
9:45am – 11:00am	Exploring Why Tobi Weingart, M.Ed, CUDE, DEEU, PAHR, Chief Program Officer, National Credit Union Foundation	AmFirst CU
11:00am – 11:45am	Mexican Feast	AmFirst CU
11:45am – 12:45pm	Personal Branding / Identity Capital Grant Abbott, VP of Lending and Administration, FSU Credit Union	AmFirst CU
12:45pm – 1:30pm	Always Take Your Seat at the Table Ryan Hesser, VP. Third Party Risk Management & Associate Legal Counsel, VyStar Credit Union	AmFirst CU
1:30pm – 2:00pm	Peer Panel	AmFirst CU
2:00pm – 2:30pm	Sweet Treat Break	AmFirst CU
2:30pm – 3:00pm	SECUF-Bite of Reality Bobbi Grady, CUDE, ODCM, Foundation Director, League of Southeastern Credit Unions & Affiliates	
3:00pm – 3:45pm	Unraveling Your Purpose: Exploring the Depths of Your Why Sedric Brinson, CUDE, SCMS, Engagement Consultant, America's Credit Unions	AmFirst CU
3:45pm – 4:00pm	Wrap-Up / Adjourn	AmFirst CU

Speakers



Grant Abbott

Grant Abbott, who joined the Florida State University (FSU) Credit Union team in 2010, graduated from the FSU College of Business with degrees in Finance and Marketing. He is a Certified Lending Expert, graduate of the Lending Solutions Consulting, Inc. (LSCI) Advanced Lending Institute, an ACFE Certified Fraud Examiner, and one of only a few professionals in the greater Tallahassee area with the Credit Union Business Lending Professional designation. Through his leadership of the iDriveLending, LLC CUSO, Grant has reviewed more than 250,000 loan applications and helped to originate nearly \$1 billion in auto loans for the North Florida markets. He has 10+ years of service on local non-profit boards and regularly speaks on topics ranging from basic budgeting tips to entrepreneurship and innovation. Additionally, he leads a community group for his local church and devotes time as a volunteer to SAFE Families for Children. Grant is also the current elected President of the Tallahassee Chapter of Credit Unions.



Jessie Betts – Bono

Jessie Betts-Bono is a longtime Tallahassee, Florida resident whose first degree and career was in surgical assisting, where she honed skills such as adaptability, critical thinking, communication, and patient advocacy. After five years in operating rooms, she returned to college to earn her bachelor's degree in business with a focus on organizational management, which allowed her to pivot her career to marketing, copywriting, and communications work. She has been the Strategic Marketing and Business Manager at Bono Communications & Marketing, LLC for five years. Jessie develops curricula for training sessions, creates marketing strategies, oversees day-to-day business operations, hosts development sessions, and coordinates public relations outreach for government, nonprofit, and for-profit organizations.

Jessie loves to help businesses reach higher levels of organizational health by teaching classes on teamwork, effective communication, leadership, development, and other in-demand skills. She has worked on campaigns involving sports associations, new business outreach, and drug awareness. In her off hours, Jessie enjoys spending time with her partner and newborn daughter, reading, traveling, playing video games, and doing DIY projects around the house.



Sedric Brinson, CUDE. SCMS

Sedric Brinson lives his life by the simple standard of the Golden Rule of treating others how he would like to be treated. A born leader who wants nothing more than to see others succeed and to see their goals accomplished. His passion for people is what fuels his desire to see communities thrive financially. Sedric's purpose in life is simply to bring awareness to the Credit Union mantle of people helping people.

Sedric has served in the industry for over 19 years. As a converted (Banker), he used those experiences as a driving force to make a difference in the Credit Union Space. Sedric received his C.U.D.E designation in the Best Class Ever of November 2017. Sedric is also a graduate of the Southwest Credit Union Management School at TCU in 2019. Sedric believes that God, Family, and Friends are the pleasures and joys of life. Without them, there is no success.



Bobbi Grady

Bobbi brings over fifteen years of nonprofit experience to her role at LSCU and the Southeastern Credit Union Foundation. Since 2019, she has been serving first as the fundraising coordinator and then as the Director of the Foundation. Prior to joining LSCU, Bobbi held positions at organizations such as the Heart Association, The ALS Association, and Alzheimer's Association, where she developed a diverse skill set in non-profit programs, management, and fundraising.

Bobbi's dedication lies in fostering the professional growth of credit union staff and volunteers, advocating for financial capability programs across all age groups, and generating valuable resources to benefit member credit unions and the communities they serve. She has a passion for making a positive impact on the lives of individuals and families by supporting programs that improve financial literacy and overall well-being.



Ryan Hesser

Ryan Hesser, currently serving as the Vice President of Third-Party Risk Management and Associate Legal Counsel at VyStar Credit Union in Jacksonville, Florida, brings a wealth of experience to the table. Her professional journey has included roles in various law fields, Mergers and Acquisitions, and compliance. Ryan holds a law degree from the University of Alabama School of Law and is on track to complete her MBA in Strategic

Leadership from Winthrop University this summer. Beyond her corporate pursuits, she is deeply committed to leadership development, particularly for young professionals. When she's not immersed in legal matters or business strategy, you'll find her cheering on her three kids at the soccer fields alongside her husband, Ty.

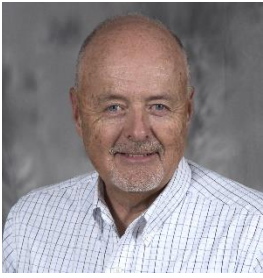


Michelle Roth

Michelle Roth serves as Alabama's Senior Director of Governmental Affairs. Michelle's background in advocacy, community, and member relations helps her to champion the industry-driven state legislative and regulatory issues agendas as well as developing and maintaining favorable relationships with lawmakers, executive leaders, and credit unions across the state.

Prior to joining LSCU, Michelle held the position of Executive Director of the Alabama Cable and Broadband Association. Through this work, she helped expand statewide broadband access and advocated for connecting low income and rural Alabamians. From 2008-2015, Michelle was the Program Manager for Leadership Alabama responsible for program management, event planning, and coordination of the statewide selection process for this annual cohort of Alabama's top leaders.

A native of Lakeland, Florida, Michelle is a graduate of the University of Alabama, she has served on the Board and Executive Committee of several public policy, charitable, statewide and community organizations, Additionally, Michelle holds the designation of Certified Association Executive (CAE), the highest professional credential in the association industry.



Steve Swofford

Steve Swofford, serves as the CEO of Alabama Credit Union since 1998, during which time the credit union has grown from \$80 million to \$1.7 billion in assets. Formerly EVP at the Alabama Credit Union League, Steve has a total of 38 years in the credit union industry. Steve has previously served on the Board of the League of Southeastern Credit Unions holding the position of Chairman. Currently, Steve serves on the Board of the Southeast Credit Union Foundation, Leverage - the League's services corporation, the West Alabama Food Bank Board and is active in Boy Scouts of America and the UA Alumni Association. Steve holds a B.S. in Marketing, and a M.A. in Finance and Economics, from The University of Alabama. In his free time, Steve enjoys hunting and fishing, and of course, Alabama football!



Tobi Weingart, M.Ed, CUDE, DEEU, PAHR

Tobi leads the strategic vision that informs the Foundation's programming, including developing and conducting signature programs like the Credit Union Development Education (DE) Program, Exploring Why™ Workshops, and other experiential, customized programming.