

LSCU Council Conference

JUNE 14, 2022

SIGNIA BY HILTON ORLANDO BONNET CREEK
ORLANDO, FL

Agenda


9:00 AM – 10:00 AM

Registration

10:00 AM – 12:00 PM

General Session

Unlocking an Ownership Culture



Greg Hawks, Corporate Culture Specialist, Keynote Speaker, and Principal at Hawks Group

There are three kinds of employees in your workplace: Owners, Renters, and Vandals. There are Five Distinct Differences between Owners and Renters. Better than engagement, advancing a spirit of ownership in employees contributes to productivity and fulfillment, exponentially. Every few years the Gallup Organization issues their State of the American Workforce report. It generally breaks down like this: 30% actively engaged, 50% not engaged, 20% actively disengaged. In Hawks Agency language, that is 30% are OWNERS, 50% are RENTERS and 20% are VANDALS.

Owners bring their heart, head, and hands to work, which translates into passion, imagination, and skill.

Renters bring only their hands. They fulfill a function.

Vandals bring division. Divisive and manipulative these silent saboteurs wreak havoc.

For leaders and employees understanding the Five Distinct Differences is essential to move forward in transforming Renters back into Owners.

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Courage At Work: Helping Emerging Leaders Take More Worthwhile Risks in an Evolving Workplace



Candace Doby, Speaker, Author, and Courage Coach

Now, more than ever, organizations need leaders to act with courage. They need leaders who are willing and able to take worthwhile risks, navigate through uncertainty, and withstand challenges to position their businesses for growth in a constantly shifting non-profit world. According to research, courage is an essential leadership quality. When emerging leaders consider potential failure or rejection in the workplace as outcomes, they can find it difficult to choose courage — opting instead for safety and limited growth. That's because they don't know how to evaluate risks or leverage the internal resources, they already must face them. In this presentation, speaker and courage coach Candace Doby helps audience members discover what's stopping them from stepping outside of their comfort zone at work and how to begin dismantling those barriers so they can take more worthwhile risks.

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12:15 PM – 1:15 PM

Lunch

1:30 PM – 2:15 PM

All Council Open/Roundtable Discussions

- **LSCU Accounting/Finance and Technology Council**
(Facilitated by Jessica Thompson, Assistant Controller, LSCU & Affiliates)
- **LSCU CEO Council**
(Facilitated by Suzanne Weinstein, President & CEO, Orlando Credit Union)
- **LSCU Compliance Council**
(Facilitated by Kela Wingard, Compliance Coordinator, LSCU & Affiliates)
- **LSCU Lending Council**
(Facilitated by Donnette' Logan, Business Development Consultant, *LEVERAGE*)
- **LSCU Marketing/Business Development Council**
(Facilitated by Kristi Arrington, Vice President, Growth by Design)
- **LSCU Operations/Member Experience Council**
(Facilitated by Laura Vann, Senior Director/Shared Services, Shared Cooperative Services)
- **LSCU Payments Council**
(Facilitated by Stephanie Hainje, Portfolio Consultant, *LEVERAGE* Payment Solutions)

2:15 PM – 2:30 PM

Break

2:30 PM – 3:15 PM

Council Breakout Sessions



- **Creating Courageous Cultures** *(Recommended for: CEOs)*
Candace Doby, Speaker/Author/Courage Coach
- **Cybersecurity & Data Privacy- Federal, State, and Regulatory Compliance in 2022**
(Recommended for: Compliance and Technology Professionals)
Jim Soenksen, CEO, PIVOT Group
Guest Speakers:
 - Allison Allen, Senior Director of Governmental Affairs (AL), LSCU
 - Grace Newcombe, Senior Director of Federal Advocacy & Communications, LSCU
 - John Rothell, Senior Director of Governmental Affairs (FL), LSCU
 - Sydney Rubin Seral, Vice President of Advocacy, LSCU
- **Driving Growth with Google Ads**
(Recommended for: Marketing/Business Development and Operations/Member Experience Professionals)
Alex Geosits & Sandra Martin, Sales Principal/New Business Strategy Team, Google
- **Exploration of Shifting Cards Trends**
(Recommended for: Payments and Accounting/Finance Professionals)
Wesley Suter, Director of Product Solutions, Fiserv
- **Build, Buy or Partner: How to Get Started with AI Underwriting**
(Recommended for: Technology and Lending Professionals)
Jose Valentin, SVP/Partnerships, Zest AI
- **Cryptocurrency Adoption Opportunities for Financial Institutions**
(Recommended for: ALL CU Professionals)
Patti Wubbels, SVP – Client Development and Crypto Advisory Services, Strategic Resource Management

3:15 PM - 4:00 PM



Council Breakout Sessions

- **Overdrafts, ACH, and Disputes**
(Recommended for: Accounting/Finance, Compliance, and Operations/Member Experience Professionals)
Carlin McCroy, Associate Attorney, Troutman Pepper
- **Exploring Legal and Compliance Lending Errors on Consumer and Real Estate Loans**
(Recommended for: Accounting/Finance, Compliance and Lending Professionals)
Jonathan Kudulis, Attorney, Kudulis, Reisinger and Price & Lynn Hightower-Moore, General Manager, Common Bond Title
- **Considering Real-Time Payments**
(Recommended for: Payments and Accounting/Finance Professionals)
Toby Thomas, VP/Product Market Strategist, Corporate One
- **How to Talk to your IT Team**
(Recommended for: Technology, CEOs, and Operations/Member Experience Professionals)
Tim Neiman, CEO, Dynamic Edge
- **How Internal Talent Mobility Creates Long Term Leadership Excellence**
(Recommended for: CEOs)
Fred Palmer, Executive Benefits Specialist, CUNA Mutual Group

5:30 PM - 6:30 PM

LSCU Council Networking Reception

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The LSCU Council Members will now have an online platform to **CONNECT** with each other, obtain information and share ideas/questions.



Learn more at the LSCU Council Conference.



Download the LSCU Events App
to access the survey and more on
the LSCU Council Conference.



Speakers

Greg Hawks, *Corporate Culture Specialist*



As a Corporate Culture Specialist, Greg shapes environments where everyone gets to contribute their best daily! For two decades he has mentored leaders, developed teams, crafted culture and empowered employees. As a Keynote Speaker, he is an enthusiastic character. His style, wit and energy consistently capture the attention and imagination of audiences. His forward thinking contributes fresh perspectives that work. He's annoyingly optimistic, contagiously energetic and slightly mischievous. People tend to like him. As a Virtual Conference Producer, he shapes an entirely different landscape. Designing the days, providing production, hosting the event, working with speakers and vendors - Greg fashions turn-key experiences that produce a virtual conference rivaling in-person gatherings!

Candace Doby, *Speaker, Author, Courage Coach*



Candace Doby is an Atlanta-based speaker, author and courage coach who works with universities and organizations to help emerging leaders activate personal courage in order to perform to their potential in school, at work and in the world. Candace combines a decade of research on courage with her experiences leading marketing teams at Chipotle Mexican Grill, starting her own business, and solo traveling to more than 20 countries. This unique combination equips her with the digestable strategies she shares with audiences to help them leverage courage to lead with authenticity, navigate through uncertainty, and transition from old realities to new possibilities.

She has worked with emerging leaders at University of North Carolina at Chapel Hill, the University of Georgia, Windemere Real Estate, Cornerstone Credit Union League, Metropolitan Atlanta Rapid Transit Authority, YMCA, American Camp Association and many others.

In her own acts of courage, Candace wrote a book, *A Cool Girl's Guide To Courage*, to offer readers a compelling entry point into intentional conversations about conjuring their courage. She quit a successful marketing career to pursue her vision of making courage fun to talk about and easy to digest for emerging leaders everywhere. And, she created *The Courage Hotline* podcast to help people call up the courage to confront their peskiest personal and professional problems.

Toby Thomas, *Vice President, Product Market Strategist, Corporate One FCU*



As a Product Market Strategist, Toby is responsible for creating a competitive advantage for Corporate One and its national field of membership by designing, supporting, and orchestrating growth-oriented Go-To-Market strategies for new products and services and analyzing and adjusting existing product market strategies. With nearly 20 years of experience in the credit union industry he has gained in-depth knowledge of the many complex aspects needed for successful cooperation among cooperatives through leadership positions in areas of national sales, investment and portfolio strategies, and successful correspondent financial products development.

Carlin McCrory, *Associate Attorney, Troutman Pepper*



A seasoned regulatory, compliance, and payments attorney, Carlin brings extensive experience representing financial institutions, fintechs, lenders, payment processors, neobanks, virtual currency companies, and mortgage servicers. Carlin regularly provides tailored compliance advice across a variety of topics, while also developing best practices strategies to help her clients advance their business goals. She routinely assists clients with vendor contracts from initial review of the agreement through termination as well as drafting and reviewing clients' internal compliance policies and procedures.

Jose Valentin, SVP, Partnerships, Zest AI



Jose helps customers integrate our technology through our strategic partnerships. He spent several years leading diverse teams of all sizes across different functions as an officer in the United States Marine Corps, where he also served as a helicopter pilot, tactics instructor, and systems development advisor. Jose is a math geek at heart -- driven by purposeful applications of technology that yield accretive social impact. When he's not nerding out on math or physically distancing due to the global pandemic, he enjoys traveling with his family and staying active. Jose is a graduate of the United States Naval Academy and holds graduate degrees in Aerospace Engineering and Business from the University of Maryland, College Park, and the UCLA Anderson School of Management.

Alex Geosits, Sales Principal, Google's New Business Strategy (NBS)



Alex is a Sales Principal on Google's New Business Strategy (NBS) team in New York City. He enjoys solving complex problems with Lead Generation, App partners and translating key business objectives into growth opportunities using Google's products. In his spare time, Alex enjoys cooking new recipes and cheering on the Philadelphia Eagles.

Sandra Martin, Sales Principal, Google's New Business Strategy (NBS)



Sandra is a Sales Principal and joined Google 2 years ago after beginning her career in Finance at J.P. Morgan and then shifting into the technology sector before joining the New Business Strategy team in New York. Sandra specializes in E-commerce and Multichannel strategies and enjoys working with new advertisers to understand their short- and long-term priorities and find creative ways to solve for both via Google properties. Sandra is passionate about scaling businesses and growing them to new heights, via Google.

Patti Wubbels, CCE, SVP, Client Development and Crypto Advisory Services, Strategic Resource Management (SRM)



Patti Wubbels is Senior Vice President of Client Development and lead for the cryptocurrency advisory services at SRM (Strategic Resource Management), an independent firm that advises financial institutions in executing business strategies and strategic sourcing initiatives. At SRM, Wubbels is passionate about helping clients with strategies around cost savings, revenue opportunities, and process efficiencies. More recently, Patti helped to launch SRM's crypto advisory, delivering education and strategic planning services for financial institutions integrating cryptocurrency and blockchain concepts and technology. She is a Certified Cryptocurrency Expert (CCE) via the Blockchain Council.

Jim Soenksen, CEO, PIVOT Group



Jim has over 20 years of experience in the information security, financial services, and technology industries. Jim, as a CPA (currently inactive), was also an internal auditor for a Fortune 100 company for 7 years. Conveying the knowledge and conviction it takes to fight cybercrime, Jim offers a realistic view of today's security, privacy, risk issues, and remedies for the business community. He blends business goals with technology, training, policies, and improved processes to provide the appropriate program and regulatory compliance for each individual company. Jim is a regular speaker and expert witness on Information Security, Cybersecurity, and Data Privacy.

Tim Neiman, CEO/Visionary, Dynamic Edge, Inc.



For 23 years, Tim has led the company's strategy and operations, evolving from a traditional, local "break/fix shop" into a leading Managed Services Provider with clients nationwide. Tim earned an MBA in Corporate Strategy and Organizational Management from the University of Michigan's Ross School of Business. In his free time, Tim is an experienced Ironman triathlete, "Favorite Uncle" to his nine nieces and nephews, and avid traveler with his husband, Casey.

Jonathan Kudulis, Attorney, Kudulis, Reisinger and Price



Jonathan Kudulis is an attorney at Kudulis, Reisinger and Price and his practice involves supervision of civil litigation for the firm's representative credit union clients, as well as general regulatory and operational guidance. Jonathan handles a wide assortment of cases, in both federal and state courts, including vendor (contract) disputes, construction disputes, regulatory issues and bond claims. Jonathan is a graduate of the University of Alabama School of Law. He is a member of the Alabama State Bar, Florida State Bar, Louisiana State Bar, Mississippi State Bar, State Bar of Texas and Virginia State Bar.

Lynn Hightower-Moore, General Manager, Common Bond Title



Lynn Hightower-Moore is the general manager of Common Bond Title. Common Bond Title investigates, analyzes, counsels, and protects property rights. Lynn has been a title and closing professional since 1983. Lynn believes that if she enables employees to grow professionally, while creating an environment of helping each other through communication, education and dependability that the common bond between her employees, realtors, lenders, loan officers, buyers and sellers will make Common Bond Title, LLC their "Preferred Title Agency". Lynn is a member of the American Land Title Association and has served on the education committee and in the certified Homeowner Outreach Program. She is also the current treasurer for the Southeastern Land Title Association and is also in the Florida Land Title Association. She is a graduate of The University of Alabama Birmingham, has her Alabama Title License and has passed the Florida Title Class. Lynn's favorite volunteer opportunities are with the Children's Hospital of Alabama.

Fred Palmer, Executive Benefits Specialist, CUNA Mutual Group



Fred is an executive benefits specialist for CUNA Mutual Group, a company that specializes in the design, implementation, financing, and ongoing administrative support of supplemental executive benefits programs specifically tailored to credit unions. He works with credit unions in the east and central regions. He brings to CUNA Mutual Group his experience in the financial services industry and has since 1981. Prior to joining CUNA Mutual Group in 2013, Palmer consulted with credit unions and banks as a senior consultant and regional vice president for two major executive benefit firms. In addition to 20 years of executive benefits consulting experience, he also has 20 years of senior management banking experience with expertise in trust, investments, corporate lending, and private banking. Fred holds a Bachelor of Science in finance from Florida State University. He is FINRA securities registered and holds life, health, and variable annuity licenses.

Wesley Suter, Director of Product Solutions, Ondot



Wesley Suter is the Director of Product Solutions for Ondot (a business unit of Fiserv). Wes is responsible for solution architecture, business development and sales enablement of the CardHub platform. Wes has over 20 years' experience in the payments, cards, and financial services industries. He began his career at Fifth Third Bank. There, his journey started in payments and card processing (FTPS/Vantiv/Worldpay), he has managed issuer relationships across a collection of banks, credit unions, and merchant co-brand clients. In 2015, Wes joined Fiserv Card Services with a focus on debit portfolio consultancy. Prior to his current role, Wes led the Credit Solution Consulting group at Fiserv Card Services where his team was responsible for assisting clients across competencies including credit portfolio strategy, digital cardholder engagement, and processing operations.

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Join the LSCU Councils Today!

The LSCU Councils bring together credit union professionals with roles in:

- Accounting/Finance
- CEO
- Compliance
- Lending
- Marketing/Business Development
- Operations/Member Experience
- Payments
- Technology

By joining an LSCU Council, you get:

- Professional Development, Networking and Engagement opportunities with other Credit Union professionals
- Invited to educational and training presentations, meetings and webinars that will increase your knowledge base and will address skills that will help you excel in your field
- To share ideas and best practices with your peers, along with the ability to share and review documents, policies, and product details for the latest in the credit union space
- Access to a private social network of other council members to collaborate with
- Engagement opportunities with vendors, sponsors, and other specialized speakers
- Peer mentoring, professional advice, and practical job-related education

For more information, go to www.lscucouncils.com