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# DIRECTORS CONFERENCE

**December 8–11, 2019**

Loews Royal Pacific Resort at Universal Orlando™  
Orlando, FL

**Powerful Learning & Networking**  
for Credit Union Directors



# A MEETING OF THE MINDS

Directors Conference is where credit union board members gather to learn, communicate and grow as industry leaders. It's also where you'll:

- Benefit from a world-class business education fostering critical thinking
- Combine theory and application to support comprehensive, effective governance
- Gather ideas and strategies to take home
- Foster strong peer relationships

Register today, and gain a deeper and broader understanding of industry trends, enhanced skills and new approaches to governance.

## Who Should Attend

Directors Conference is ideal for your:

- Directors
- Board officers
- Supervisory committee members
- CEO

Consider sending your entire board, including your board liaison! The group will benefit from shared learning experiences, build camaraderie, and head home with many great ideas to implement. It also offers a terrific opportunity to hold a full board meeting on-site—we can help you plan it!



"As always, talking and networking with other directors was invaluable. The presentation content was current and matched what I needed for my growth and as a credit union director."

**Ron Meyers** • Director  
DUPACO • Dubuque, Iowa  
Assets: \$1.70 billion



Jump Start Your Learning With a Pre-Conference Session

## DIRECTOR EXCELLENCE TRAINING

Make the most of your educational experience by attending a pre-conference session on Sunday, December 8 from 1:00–3:30 p.m. Separate registration is required to attend.

**CUES Members \$195/Non-Members \$395.**



### ***What Would You Do? Situational Strategies for Boards***

**Ancin Cooley, CIA, CISA**

Founder and Principal, Synergy Credit Union Consulting, Inc.

As a board member, you must be prepared for any situation your credit union may encounter. It's your responsibility to ensure your credit union has a playbook for ways to handle difficult situations. In this workshop, Ancin will address pressing questions about growing your loan portfolio, improving your balance sheet, CECL prepping, mergers, and much more.

### **Earn Credit for Attending Directors Conference**



Attendees of Directors Conference can earn continuing professional education credits. This conference meets the following standards:

- CPE credits: Earn up to 14
- Program level: Overview
- Delivery method: Group-live
- Field of Study: Business Management & Organization
- Prerequisites: None

CUES is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org)



Directors Conference provides high-level, board member-specific content not available anywhere else.

## GENERAL SESSIONS



### ***To All the Economists I've Loved Before***

**Anirban Basu**, Chairman & Chief Executive Officer, Sage Policy Group, Inc.

Join Anirban for a discussion of global, national, and regional economic performance, with special attention given to the financial, labor, real estate, and construction markets.



### ***How to Be a Visionary Leader (And Predict the Future)***

**Rohit Bhargava**, Founder, Non-Obvious Company, Innovation and Marketing Expert

In this presentation based on his bestselling book *Non-Obvious*, frequent disruptor and innovation expert Rohit Bhargava will reveal the five key steps of his signature "Haystack Method," to predict and prepare for the future.



### ***Running Towards Chaos***

**Natalie Stavas**, Inspirational Boston Marathon Hero, Humanitarian, Award-Winning Physician

An avid runner, Natalie's philosophy for success is "You Run Toward." This was never more apparent than in April 2013; she finishing the Boston marathon when bombs detonated at the finish line. Instead of turning around and running away, she ran toward the chaos—and saved four lives. In this inspiring session, Natalie will speak about her experience, and what led her to make the decision to run into a terrorist attack that day.



### ***Making Digital Personal: The Way Forward in the Era of FinTechs, BigTechs & MegaBanks***

**Lee Wetherington**, AAP, Director of Strategic Insight, Jack Henry & Associates, Inc.

Join Lee for an inspiring review of how credit unions are beginning to translate their trust and personal service meaningfully into digital channels by humanizing support at the limits of self-service.

Visit [cues.org/DC2019](https://www.cues.org/DC2019) for full session descriptions and speaker bios. Speakers and sessions subject to change.

# FORUMS, PANELS & BREAKOUT SESSIONS

## *Panel Session: How to Recruit, Engage, and Retain Millennial Board Members*

**Moderator:** Michael Daigneault, Principal & Founder, Quantum Governance, L3C

**Panelists:** Shanna Yonke, Connexus Credit Union; James Sackett, Firefly Credit Union; and Gregory Jenkins, Greensboro Municipal Credit Union

## *Your Role in Digital Transformation*

**Belinda Caillouet**  
Owner, Looking Glass Consulting

## *Convergence: The Intersection Between Enterprise Risk Management and Internal Audit*

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

## *Payments Trends and Industry Update*

**Tony DeSanctis**  
Senior Director, Cornerstone Advisors, Inc.

## *The Road to High Performance—How to Make Your Credit Union's Strategic Planning Process Really Work*

**Bill Goedken, CPA, CMA, CGMA**  
CEO, idea5, Inc.

## *Credit Unions 2025—The future is closer than you think!*

**Bill Goedken, CPA, CMA, CGMA**  
CEO, idea5, Inc.

## *Turn Your Branches into Real Assets*

**Joe Karlin**  
Owner, Karlin Consulting, LLC

## *20 Questions Directors Should Ask About Board Recruitment, Development, and Assessment*

**Richard Leblanc, Ph.D.**  
President, Professor, Attorney, Boardexpert.com

## *Blockchain Benefits—Trusted Transactions and Distributed Data*

**Steve Stasiukonis**  
Managing Partner, Secure Network

## *Strategic Governance*

**Patricia Brownell Sterner**  
President/CEO, JFB Associates, LLC

## *The Most Critical Responsibilities of Newer Board Members*

**Les Wallace, Ph.D.**  
President, Signature Resources

## *NCUA Update*

Speaker and session info coming soon. Check [cues.org/DC2019](https://cues.org/DC2019) for updates.



## CAREFREE FUN IN ORLANDO!

At Loews Royal Pacific Resort at Universal Orlando™ you'll experience the allure of the South Seas with exotic food and elegant surroundings, plus convenient access to Universal Studios Florida™ or Universal's Islands of Adventure™ and Universal's Volcano Bay™.

Hotel rates in the CUES block range from \$199/night to \$289/night depending on beds and number of occupants. **Please make your reservations prior to Friday, November 15, 2019** by calling **866.360.7395** and mentioning Credit Union Executives Society. Early reservations are recommended as our room block frequently sells out.

Learn more about hotels, air travel and car rental at [cues.org/DC2019](https://cues.org/DC2019) for options and links to online booking.

**Make your plans early! This popular destination is likely to sell out quickly.**

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## GET THE COMPLETE EXPERIENCE

Bringing a guest? We have some fantastic excursions planned! Learn more about our Spouse/Guest Program and optional meal plan at [cues.org/DC2019](https://cues.org/DC2019).





## MAKE YOUR PLANS EARLY!

Directors Conference is known for its “just right” blend of location, education and networking. Experience it all beginning Sunday, December 8. The Pre-Conference Workshop begins at 1:00 p.m. Join us at the Welcome Reception from 6:30–8:30 p.m.

Directors Conference ends at 10:30 a.m. on Wednesday, December 11. CUES members attend for \$1,645, a \$750 savings off the non-member price of \$2,395.

Registration fee includes:

- All educational sessions and materials
- Sunday Welcome Reception
- Breakfast on Monday, Tuesday and Wednesday
- Monday luncheon to honor the 2019 CUES Distinguished Director

**Register early! Rates increase \$400 after October 24, 2019.**

Visit [cues.org/DC2019](http://cues.org/DC2019), or call **800.252.2664** or **608.271.2664, ext. 340**, and register today. From Canada, call **604.559.4455**.

# DIRECTORS CONFERENCE

DECEMBER 8-11, 2019  
ORLANDO, FL



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