

SYMPOSIUM AGENDA | 2026

DAY 01 SUN, FEB 01

9:00–11:00 a.m. Bloody Mary Bar
Hosted by Member Loyalty Group

4:00–5:30 p.m. CUES Symposium Registration & Welcome Reception

DAY 02 MON, FEB 02

6:30–8:00 a.m. Breakfast Buffet

8:00–10:00 a.m. **Welcome & General Session**
Welcome to Symposium
Vaishali Jadhav

Digital Transformation and the Future of Direct-to-Consumer Business
David R. Bell

10:00–10:15 a.m. Networking Break

10:15–11:30 a.m. **General Session Continued**
Digital Transformation and the Future of Direct-to-Consumer Business
David R. Bell

11:30–11:45 a.m. **Closing Remarks**
Vaishali Jadhav

Afternoon Lunch – On Your Own
Optional Events – separate registrations required

DAY 03 TUES, FEB 03

6:30–8:00 a.m. Breakfast Buffet

Women in Leadership Breakfast Session

Breakout Sessions

YELLOW GROUP
The Future-Ready Board: Strategies to Strengthen Credit Union Board Leadership
Anthony Goodman & Andrea Gosz

ORANGE GROUP
DeRisking Environmental Threats: Strategies for Today's Leaders
Heather LaMarre

BLUE GROUP
Disrupting the Innovation Process: How to use AI to triple the speed and increase the quality of your innovation process
David Robertson

9:30–9:45 a.m. Networking Break

9:45–11:00 a.m. **Breakout Sessions Continue**

11:00–11:05 a.m. Travel Time

11:05 a.m. – 12:00 p.m. **Bonus Sessions**
Board Chair Roundtable: Strengthening Governance and Strategic Leadership
Steve Williams

Actionable AI, Start to Finish: Two Real Use Cases Demonstrated Live!
Josh DeTar

Beyond the Basics: Emerging Trends in Executive Retention & Succession Strategy
Debra Hilton & Brian Kidwell

Afternoon Lunch – On Your Own
Optional Events – separate registrations required



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DAY 04	WED, FEB 04	DAY 05	THURS, FEB 05
6:30–8:00 a.m.	Breakfast Buffet	6:30–8:00 a.m.	Breakfast Buffet
8:00–9:30 a.m.	Breakout Sessions YELLOW GROUP <i>DeRisking Environmental Threats: Strategies for Today's Leaders</i> Heather LaMarre ORANGE GROUP <i>Disrupting the Innovation Process: How to use AI to triple the speed and increase the quality of your innovation process</i> David Robertson BLUE GROUP <i>The Future-Ready Board: Strategies to Strengthen Credit Union Board Leadership</i> Anthony Goodman & Andrea Gosz	7:00–7:45 a.m.	Visa Bonus Breakfast Session Presented by: Pace Bradshaw
9:30–9:45 a.m.	Networking Break	8:00–9:30 a.m.	Breakout Sessions YELLOW GROUP <i>Disrupting the Innovation Process: How to use AI to triple the speed and increase the quality of your innovation process</i> David Robertson ORANGE GROUP <i>The Future-Ready Board: Strategies to Strengthen Credit Union Board Leadership</i> Anthony Goodman & Andrea Gosz
9:45–11:00 a.m.	Breakout Sessions Continue	9:30–9:45 a.m.	Networking Break
11:00–11:05 a.m.	Travel Time	9:45–11:00 a.m.	Breakout Sessions Continue
11:05 a.m. – 12:00 p.m.	Bonus Sessions <i>CEO Roundtable: Collaborative Leadership for a Changing Credit Union Landscape</i> Steve Williams <i>From Hype to Member Value</i> Adam Foldenauer & Hilary Foster <i>Unlocking the Business Market</i> Panel moderated by: David Wright	11:00–11:15 a.m.	Networking Break
Afternoon	Lunch – On Your Own Optional Events – separate registrations required	11:15 a.m. – 12:00 p.m.	General Session: Parting Perspectives Vaishali Jadhav
5:00–6:30 p.m.	Aloha Closing Reception	12:00 p.m.	CUES Symposium Concludes

