

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

7:00 – 7:45 a.m. **Women in Leadership Breakfast Session**

8:00 – 9:30 a.m. **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

- 6:30 – 8:00 a.m. Breakfast Buffet
- 8:00 – 9:30 a.m. **Breakout Sessions**
- YELLOW GROUP**
DeRisking Environmental Threats: Strategies for Todays Leaders
Heather LaMarre
- ORANGE GROUP**
Disrupting the Innovation Process: How to use AI to triple the speed and increase the quality of your innovation process
David Robertson
- BLUE GROUP**
The Future-Ready Board: Strategies to Strengthen Credit Union Board Leadership
Anthony Goodman & Andrea Gosz
- 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**
- CEO Roundtable: Collaborative Leadership for a Changing Credit Union Landscape*
Steve Williams
- From Hype to Member Value*
Adam Foldenauer & Hilary Foster
- Unlocking the Business Market*
Panel moderated by: David Wright
- Afternoon Lunch – On Your Own
- Optional Events – separate registrations required
- 5:00 – 6:30 p.m. **Aloha Closing Reception**

DAY 05

THURS, FEB 05

- 6:30 – 8:00 a.m. Breakfast Buffet
- 7:00 – 7:45 a.m. Visa Bonus Breakfast Session
Presented by: Pace Bradshaw
- 8:00 – 9:30 a.m. **Breakout Sessions**
- YELLOW GROUP**
Disrupting the Innovation Process: How to use AI to triple the speed and increase the quality of your innovation process
David Robertson
- ORANGE GROUP**
The Future-Ready Board: Strategies to Strengthen Credit Union Board Leadership
Anthony Goodman & Andrea Gosz
- BLUE GROUP**
DeRisking Environmental Threats: Strategies for Todays Leaders
Heather LaMarre
- 9:30 – 9:45 a.m. Networking Break
- 9:45 – 11:00 a.m. **Breakout Sessions Continue**
- 11:00 – 11:15 a.m. Networking Break
- 11:15 a.m. – 12:00 p.m. **General Session: Parting Perspectives**
Vaishali Jadhav
- 12:00 p.m. **CUES Symposium Concludes**

