



NACUSO Network Conference Schedule

NACUSO Conference Registration Desk: **Palm Foyer**
 Sunday's Opening Welcome Reception in the Networking Exhibits Lounge: **Seaport Foyer**
 Monday's Private Invite Only Event/Advocacy Breakfast with Emmitt Smith: **See Ticket for Meeting Location**
 Networking Exhibits Lounge & Hospitality Receptions: **Seaport Foyer**
 General Sessions, Breakfasts & Lunches: **Seaport Ballroom**
 Breakout Session Rooms: **Balboa, Gaslamp, Seaport F, Seaport G, Seaport H**
 Exhibitor Breakroom/Press Room: **Old Town**

Day 1: Event Schedule for Sunday, April 14

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| 7:15 a.m. to 2:45 p.m. | Golf Outing: Shuttle Departs Hotel to Omni La Costa Resort & Spa | Grand Hyatt Lobby |
| 9:15 a.m. to 2:45 p.m. | Spa Outing: Shuttle Departs Hotel to Omni La Costa Resort & Spa | Grand Hyatt Lobby |
| 10:00 a.m. to 5:00 p.m. | Exhibitor Set-up in the Networking Exhibits Lounge Time | Seaport Foyer |
| 2:00 p.m. to 7:30 p.m. | Attendee Conference Registration Desk Open | Palm Foyer |
| 2:45 p.m. | Shuttle returns from Golf & Spa Outing | Grand Hyatt Lobby |
| 3:00 p.m. to 4:00 p.m. | General Session: NACUSO Welcome & Hot Topics for CUs & CUSOs in 2019 From Messick Lauer & Smith PC: Brian Lauer, Amanda Smith, Mike Heller & Jennifer Winston | Seaport F |
| 4:10 p.m. to 5:00 p.m. | Breakout Sessions Entrepreneur/CEO/Business Development Track CUSO Planning and Execution Considerations - Sara Brooks, Humintex | Seaport F |
| | Innovation/Operational/Technology Track How will Artificial Intelligence Impact Your Credit Union? - Kirk Drake, Ongoing Operations, LLC | Seaport G |
| | Lending Services Track The Credit Union Fintech Solution to Immediate and Sustainable Member, Asset and Revenue Growth - Mike Joplin, CU Revest | Seaport H |
| 5:10 p.m. to 6:00 p.m. | Breakout Sessions Big Data/Data Analytics Track Digital Marketplace: The Future Financial Services Business Model - Rojin Nair, Celero | Seaport F |
| | Lending Services Track What Zillow's Move into the Mortgage Business Means for Credit Unions Omar Jordan, LenderClose & Benjamin Rempe, LenderClose | Seaport H |
| 6:00 p.m. to 7:30 p.m. | Networking Exhibits Lounge: Opening Welcome Reception (Spouses Welcome) | Seaport Foyer |

Day 2: Event Schedule for Monday, April 15

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| 8:00 a.m. to 6:00 p.m. | Conference Registration Desk & Networking Exhibits Lounge Open | Palm & Seaport Foyers |
| 8:00 a.m. to 9:15 a.m. | Breakfast Buffet & Networking Exhibits Lounge Time | Seaport Ballroom/Foyer |
| 8:00 a.m. to 9:00 a.m. | NACUSO Advocacy Fundraiser Breakfast (Private Contributor Event) | See Ticket for Location |
| 9:15 a.m. to 9:30 a.m. | NACUSO Intro & Morning Announcements | Seaport Ballroom |
| 9:30 a.m. to 10:30 a.m. | Opening Keynote provided by Mastercard: A Championship Vision Emmitt Smith, Pro Football Hall of Fame, Running Back, Businessman and Entrepreneur | Seaport Ballroom |
| 10:30 a.m. to 11:00 a.m. | Refreshment Break in the Networking Exhibits Lounge | Seaport Foyer |
| 11:10 a.m. to Noon | <u>Breakout Sessions</u> Insurance Services Track Artificial Intelligence in the Insurance Industry - Dr. Betty Moon, SAP Americas | Balboa |
| | Investment Services Track Grow Revenue & Serve Members: Empower Them to Address their Health & Care Funding Heywood Sloane, Diversified Services Group & Robert Grieb, Diversified Services Group | Gaslamp |
| | Innovation/Operational/Technology Track Improve your Payments Program by Focusing on the Member Experience Chris Giles, Maps Credit Union, Lou Grilli, Trellance, Bruce Dragt, CO-OP Financial Services & Dean Young, PSCU | Seaport F |
| | Innovation/Operational/Technology Track Sharpen Your Digital Strategy: Digital Trends Shaping the Financial Sector Tammie Kovacs, CUNA Mutual Group & David Pierce, CUNA Mutual Group | Seaport G |
| | Lending Services Track Innovation Through Digital Mortgages - Tammy Trefny, Fannie Mae | Seaport H |
| Noon to 1:00 p.m. | Buffet Luncheon & Networking Exhibits Lounge Time | Seaport Ballroom/Foyer |
| 1:00 p.m. to 1:30 p.m. | NACUSO Members Annual Meeting, Board Recognition & Hotel Certificate Raffle Next Big Idea Wild Card Pitches – Audience votes for 5 th Contestant! | Seaport Ballroom |
| 1:30 p.m. to 1:45 p.m. | General Session: Solving Problems Through CUSOs Introduction | Seaport Ballroom |
| 1:50 p.m. to 2:40 p.m. (repeated at 3:10 p.m.) | Solving Problems Through CUSOs Sessions (Multiple Facilitators) Solving Problems Through CUSOs: Insurance Solving Problems Through CUSOs: Investments Solving Problems Through CUSOs: Big Data & Data Analytics Solving Problems Through CUSOs: Operational Solving Problems Through CUSOs: Technology Solving Problems Through CUSOs: Lending | Balboa Gaslamp Seaport F Seaport G Seaport H Seaport Ballroom |
| 2:40 p.m. to 3:00 p.m. | Refreshment Break in Networking Exhibits Lounge | Seaport Foyer |
| 3:10 p.m. to 4:00 p.m. (repeated from 1:50 p.m.) | Solving Problems Through CUSOs Sessions (Multiple Facilitators) Solving Problems Through CUSOs: Insurance Solving Problems Through CUSOs: Investments Solving Problems Through CUSOs: Big Data & Data Analytics Solving Problems Through CUSOs: Operational Solving Problems Through CUSOs: Technology Solving Problems Through CUSOs: Lending | Balboa Gaslamp Seaport F Seaport G Seaport H Seaport Ballroom |

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| 4:10 p.m. to 5:00 p.m. | Breakout Sessions | |
| | Insurance Services Track | Balboa |
| | J.D. Power: Navigating Moments of Truth for Customers - Robert M. Lajdziak, J.D. Power | |
| | Investment Services Track | Gaslamp |
| | Building a Successful Advisory Services Offering-Best Practice Panel Mike Prior, CUFN/Priority Financial Group, Alan Althouse, TruWest Credit Union & Tom Hubert, Redwood Credit Union | |
| 5:00 p.m. to 6:00 p.m. | Big Data/Data Analytics Track | Seaport F |
| | Multi-CUSO Collaboration: Maximizing the Power of Analytics Paul Ablack, OnApproach, Keith Kelly, CU RateReset & Karan Bhalla, CU Rise Analytics, LLC | |
| | Innovation/Operational/Technology Track | Seaport G |
| | Trading the Pressure of Invention for the Thrill of Innovation - Bruce Dragt, CO-OP Financial Services | |
| | Lending Services Track | Seaport H |
| | How Loans Contribute Value (or Not): The Inside Analysis of Lending Profitability Steve Wofford, Kohl Analytics Group | |
| 5:00 p.m. to 6:00 p.m. | Networking Exhibits Lounge: Hospitality Reception with Partners & Sponsors | Seaport Foyer |
| Day 3: Event Schedule for Tuesday, April 16 | | |
| 7:45 a.m. to 6:00 p.m. | Conference Registration Desk & Networking Exhibits Lounge Open | Palm & Seaport Foyers |
| 7:45 a.m. to 8:30 a.m. | Breakfast Buffet & Networking Exhibits Lounge Time | Seaport Ballroom/Foyer |
| 8:30 a.m. to 9:00 a.m. | Morning Announcements & CUSO of the Year Awards Presentation | Seaport Ballroom |
| 9:00 a.m. to 10:00 a.m. | General Session: Team Human Douglas Rushkoff, Author & Speaker | Seaport Ballroom |
| 10:00 a.m. to 10:20 a.m. | Refreshment Break in the Networking Exhibits Lounge | Seaport Foyer |
| 10:30 a.m. to 11:15 a.m. | General Session: How Credit Unions Are Meeting Today's Challenges Dan Berger, NAFCU, Jack Antonini, NACUSO & Guy Messick, Messick Lauer & Smith PC | Seaport Ballroom |
| 11:20 a.m. to 12:10 p.m. | Breakout Sessions | |
| | Entrepreneur/CEO/Business Development Track | Balboa |
| | Serving the Cannabis Industry...Best Practices from CU Experts Rachel Pross, Maps Credit Union, Deirdra O'Gorman, DX Consulting & Tony Repanich, Shield Compliance | |
| | Investment Services Track | Gaslamp |
| | Regulatory Update: What's New with Best Interest/Fiduciary Rules, State actions against CU Branding and other Hot Investment Services Topics Erik Canedy, LPL Financial, Peter Vonk, CUSO Financial Services, L.P. & Guy Messick, Messick Lauer & Smith PC | |
| | Big Data/Data Analytics Track | Seaport F |
| | Getting ROI from CECL with LP Analytics - Joseph Breeden, Deep Future Analytics | |
| | Innovation/Operational/Technology Track | Seaport G |
| | The Evolution of Payments Fraud (and how to fight it) Nick Curcuru, Mastercard & Chris Giles, Maps Credit Union | |
| | Lending Services Track | Seaport H |
| | Lending Artificial Intelligence Panel Discussion hosted by Kirk Drake & Brian Lauer Ben Morales, QCash Financial, Karan Bhalla, CU Rise Analytics, & Mike Joplin, CU Revest | |

Tuesday Schedule continued...

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| 12:10 p.m. to 1:00 p.m. | Buffet Luncheon & Networking Exhibits Lounge Time | Seaport Ballroom/Foyer |
| 1:10 p.m. to 2:00 p.m. | <p><u>Breakout Sessions</u></p> <p>Entrepreneur/CEO/Business Development Track</p> <p>Case Study: Anatomy of a Name Change - CU Companies to The Servion Group... The Why and Hows of Creating Successful ReBrands Mollie Young, Nametag International & LeAnn Case, The Servion Group</p> <p>Investment Services Track</p> <p>Time for a Checkup: How Healthy is Your Credit Union's Investment Services Program? Kevin Mummau, CUSO Financial Services, L.P. & Tim Kehrer, Kehrer Bielan Research & Consulting</p> <p>Entrepreneur/CEO/Business Development Track</p> <p>Privacy and What it Means to a Credit Union - Nick Curcuru, Mastercard</p> <p>Lending Services Track</p> <p>Indirect Lending Panel Discussion - Adrian Dominguez, CU Alliance</p> <p>Lending Services Track</p> <p>MBL Session with NCUA - Vin Vieten, NCUA</p> | <p>Balboa</p> <p>Gaslamp</p> <p>Seaport F</p> <p>Seaport G</p> <p>Seaport H</p> |
| 2:10 p.m. to 3:00 p.m. | <p><u>Breakout Sessions</u></p> <p>Insurance Services Track</p> <p>Insurance Services Case Study: Integrated Quote Technology Nick Bloxham, SELCO Group/SELCO Community Credit Union</p> <p>Investment Services Track</p> <p>The Power of Financial Planning: Incorporating New Delivery Channels Zach Porter, Securities America and Remote Panelists: John Marx, Elevations Credit Union & Robert Cribbs, Elevations Credit Union</p> <p>Big Data/Data Analytics Track</p> <p>Using Data to Create a Unique Member Experience - Lou Grilli, Trellance</p> <p>Innovation/Operational/Technology Track</p> <p>Banking Artificial Intelligence Panel Discussion Hosted by Kirk Drake & Brian Lauer Nikhil Lakhanpal, Narmi, Fabio Sant'Anna, SRM & Karan Kashyap, Posh</p> <p>Lending Services Track</p> <p>Realizing CUSO Success in a Networked Business Scott Patterson, CU Student Choice & Jim Holt, CU Student Choice</p> | <p>Balboa</p> <p>Gaslamp</p> <p>Seaport F</p> <p>Seaport G</p> <p>Seaport H</p> |
| 3:00 p.m. to 3:15 p.m. | Refreshment Break in the Networking Exhibits Lounge | Seaport Foyer |
| 3:15 p.m. to 5:00 p.m. | Mastercard Update & Next Big Idea Competition | Seaport Ballroom |
| 5:00 p.m. to 6:00 p.m. | Hospitality Reception in the Networking Exhibits Lounge with Partners, Sponsors and the Next Big Idea Competitors | Seaport Foyer |
| 6:00 p.m. | Exhibitor Tear-down | Seaport Foyer |

Day 4: Event Schedule for Wednesday, April 17

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| 7:45 a.m. to 11:00 a.m. | Conference Registration Desk Open (Exhibitor Tear-down) | Palm Foyer |
| 7:45 a.m. to 8:30 a.m. | Breakfast Buffet | Seaport Ballroom |
| 8:30 a.m. to 9:30 a.m. | General Session: I wasn't hacked... Was I? Jim Stickley, Stickley on Security | Seaport Ballroom |
| 9:30 a.m. to 10:15 a.m. | General Session: A Divided Washington and the Cost/Benefit Ratio of Gridlock and Stalemate for Credit Unions and CUSOs Dennis Dollar, Dollar Associates, LLC | Seaport Ballroom |
| 10:15 a.m. to 10:45 a.m. | General Session: 2019 Regulatory Insiders Panel Dennis Dollar, Dollar Associates, LLC & Guy Messick, Messick Lauer & Smith PC | Seaport Ballroom |
| 10:45 a.m. to 11:00 a.m. | Conference Conclusion | Seaport Ballroom |

Thank You to All Our Sponsors, Partners and Exhibitors for Making the 2019 NACUSO Network Conference a Reality:

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