



CONFERENCE AGENDA

DAY 1		
TIME	DESCRIPTION	PRESENTER
8:00-9:00 a.m.	Registration/Breakfast Sponsor: Member Business Financial Services	--
9:00-9:30 a.m.	Intro to Visionary/Welcome from CU*SOUTH	James Versaw Bob West
9:30-10:30 a.m.	General Session 1	--
--	The Impact of Credit Unions and the Value of Scale	Dennis Dollar
10:30-10:45 a.m.	Break Sponsor: Open Lending Sponsor: OMNICOMMANDER	--
10:45-11:45 a.m.	General Session 2	--
10:45-10:55 a.m.	Sponsor Introduction: Shazam	Starla Honea
10:55-11:45 a.m.	Navigating Merger Partnerships Sponsor: CUNA	Merger Panel
11:45 a.m.-12:45 p.m.	Lunch Sponsor: McQueen Financial Advisors	--
12:45-1:30 p.m.	Breakout 1A: The Perfect Storm: Post COVID-19 Fraud Sponsor: Shazam	Mike Burke
12:45-1:30 p.m.	Breakout 1B: Managing Risk Amid Rising Rates, Inflation, and Economic Challenges Sponsor: McQueen Financial Advisors	Jim Craven
12:45-1:30 p.m.	Breakout 1C: The New Wealth Management Reality	Justin Steitz

* Agenda subject to updates and changes.



CONFERENCE AGENDA

DAY 1 (CONTINUED)		
TIME	DESCRIPTION	PRESENTER
1:40-2:25 p.m.	Breakout 2A: Data-Driven Decisions and Data Integrity	Zakery Lewellen
1:40-2:25 p.m.	Breakout 2B: The Why Behind ITMs Sponsor: Quality Data Systems	Sean Farrell Rick Preble
1:40-2:25 p.m.	Breakout 2C: Business Lending Industry Updates Sponsor: Member Business Financial Services	Mark Ritter
2:25-2:50 p.m.	Break Sponsor: Coin, Currency & Document Systems, Inc Sponsor: TransFund	--
2:50-3:35 p.m.	Breakout 3A: The Benefits of Credit Cards in the Core	Meg Ramos
2:50-3:35 p.m.	Breakout 3B: BSA Training	Michele Gonzales
2:50-3:35 p.m.	Breakout 3C: Credit Score and Financial Health Sponsor: SavvyMoney	Kacie Mach
3:45-4:45 p.m.	General Session 3	--
--	What's in the Kitchen?	Geoff Johnson
4:45-5:00 p.m.	Closing/Intros/Awards	Bob West James Versaw
5:00-5:30 p.m.	Sponsor Networking	--
5:30-7:30 p.m.	Reception Sponsor: Shazam	--

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CONFERENCE AGENDA

DAY 2		
TIME	DESCRIPTION	PRESENTER
8:00-9:00 a.m.	Breakfast <i>Sponsor: SavvyMoney</i>	--
9:00-9:30 a.m.	Welcome to Day 2	James Versaw Laura Nehls Danny Phillips Dave Roberts
9:30-10:45 a.m.	General Sessions 4 and 5	--
--	Utilizing 1-Click Loans in CU*BASE	1-Click Panel
--	Collections and Recoveries: Looking to the Future	Dustin Nehls
10:45-11 a.m.	Break <i>Sponsor: Sage Direct</i> <i>Sponsor: LandrumHR</i>	--
11:00-11:45 a.m.	General Session 6	--
--	The Benefits of CDFI Certification	Chriselle Martinez
11:45 a.m.-12:45 p.m.	Lunch <i>Sponsor: Copper Financial</i>	
12:45-1:30 p.m.	Breakout 4A: Collections and Recoveries	Danny Phillips Dustin Nehls
12:45-1:30 p.m.	Breakout 4B: BSA Training	Michele Gonzales
12:45-1:30 p.m.	Breakout 4C: CU*Base Release Summary	Starla Honea Marsha Sapino

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CONFERENCE AGENDA

DAY 2 (CONTINUED)		
TIME	DESCRIPTION	PRESENTER
1:40-2:25 p.m.	Breakout 5A: 1-Click Loan Deep Dive	Danny Phillips
1:40-2:25 p.m.	Breakout 5B: Cybersecurity Responsiveness: A Tabletop Exercise	Derrick Smith Dave Roberts Ron Martin
2:25-2:50 p.m.	Break Sponsor: Servion Mortgage Sponsor: eDOC Innovations	--
2:50-3:35 p.m.	Sponsor Networking	--
2:50-3:35 p.m.	Systems and Technology Roundtable Sponsor: Aperta	Dave Roberts Ron Martin
2:50-3:35 p.m.	Accounting and Finance Roundtable Sponsor: Colleging	Laura Nehls Michele Gonzales
3:35-3:45 p.m.	Closing/Recap	James Versaw Derrick Smith
3:45-4:45 p.m.	CU*SOUTH Annual Shareholders Meeting	--
5:00-5:30 p.m.	CU*SOUTH Board Meeting	--
6:00-7:30 p.m.	Shareholders Dinner	--

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