

# Day 1



Monday | April 11

## Agenda

7:30   9:00 AM	<b>Breakfast</b>   Emerald Coast Room, 2nd Floor		
8:00   9:00 AM	<b>Registration</b>		
9:00   9:15 AM	<p align="center"><b>Introduction   2022 Visionary Conference</b> DERRICK SMITH, President, CU*SOUTH</p>		
9:15   10:30 AM	<p align="center"><b>General Session 1   Ballroom A-B</b></p> <p><b>The Power of Community</b>   WYNONA SHADDIX, Relationship Manager, CU*SOUTH MICHELE GONZALES, Accounting Services Manager, CU*SOUTH JACK DOLL, Board Chairman, Newark Firemen Federal Credit Union</p> <p><b>New Ways to Serve Your Community</b>   RICK PREBLE, President &amp; CEO, RVA Financial</p>		
10:30   10:45 AM	<b>Break</b>		<p>Sponsored By:  <b>TransFund</b> making money move</p>
10:45   12:00 PM	<p align="center"><b>General Session 2   Ballroom A-B</b></p> <p><b>How to Reach Your Community</b>   AMY HERBIG, Chief Marketing Officer, CU*SOUTH <b>People Based Lending</b>   DUSTIN NEHLS, VP of Consumer Lending, Honor Credit Union</p>		
12:00   1:00 PM	<b>Lunch</b>   Emerald Coast Room, 2nd Floor		<p>Sponsored By:  <b>MVi</b></p>
1:00   1:45 PM	<p><b>Breakout Session 1A   Ballroom A-B</b></p> <p><b>Online Credit Cards</b></p> <p>MEGAN ERNSBERGER Client Dev Consultant, CU*SOUTH</p>	<p><b>Breakout Session 1B   Salon C</b></p> <p><b>NSF/Courtesy Pay Programs</b></p> <p>JIM VILKER VP of Professional Services, AuditLink</p>	<p><b>Breakout Session 1C   Salon D-F</b></p> <p><b>Credit Scores &amp; Financial Wellness Tools</b></p> <p>ANDI TONIETTI-CALDWELL Director of Business Dev., Savvy Money</p>
	<p align="right">Sponsored By:  <b>MELE PRINTING</b></p>		
1:45   2:00 PM	<b>Break</b>		
2:00   2:45 PM	<p><b>Breakout Session 2A   Ballroom A-B</b></p> <p><b>Different Ways to Lend</b></p> <p>DUSTIN NEHLS VP of Consumer Lending, Honor CU JAMES VERSAW VP of Client Experience, CU*SOUTH</p>	<p><b>Breakout Session 2B   Salon C</b></p> <p><b>BSA Compliance Annual Training</b></p> <p>MICHELE GONZALES Accounting Services Mgr, CU*SOUTH (Repeats on Day 2   Breakout Session 4B)</p>	<p><b>Breakout Session 2C   Salon D-F</b></p> <p><b>Xpress Teller</b></p> <p>JASON REED Client Education Specialist, CU*SOUTH</p>
	<p align="right">Sponsored By:  <b>MELE PRINTING</b></p>		
2:45   3:00 PM	<b>Break</b>		
3:00   3:45 PM	<p><b>Breakout Session 3A   Ballroom A-B</b></p> <p><b>CECL</b></p> <p>JIM CRAVEN VP, McQueen Financial Advisors</p>	<p><b>Breakout Session 3B   Salon C</b></p> <p><b>File &amp; Report Automation</b></p> <p>JAMES VERSAW VP of Client Experience, CU*SOUTH</p>	<p><b>Breakout Session 3C   Salon D-F</b></p> <p><b>Faster Payments</b></p> <p>LISA COFFEY Chief Innovation Officer Corporate America Credit Union</p>
	<p align="right">Sponsored By:  <b>SHAZAM</b></p>		
3:45   4:00 PM	<b>Break</b>		
4:00   5:00 PM	<p align="center"><b>General Session 3   Ballroom A-B</b></p> <p><b>CU*BASE Release Recap 2020-2022</b> STARLA HONEA, Senior VP of Sales, CU*SOUTH</p>		
5:30   7:30 PM	<p align="center"><b>Networking Reception</b></p> <p align="center">Sponsored By:  <b>SHAZAM</b></p>		

# Day 2 Tuesday | April 12

## Agenda

7:30   9:00 AM		Breakfast   Emerald Coast Room, 2nd Floor		Sponsored By: 	
9:00   10:30 AM		<p style="text-align: center;"><b>General Session 4   Ballroom A-B</b></p> <p><b>cuasterisk.com - What's Next?</b>   GEOFF JOHNSON, CEO, CU*Answers</p> <p><b>Data Center Operations</b>   JIM LAWRENCE, VP of Operations &amp; Business Continuity, CU*Answers JEFF MILLER, Production Center Business Dev. Manager, CU*Answers</p>			
10:30   10:45 AM		<b>Break</b>			
10:45   12:00 PM		<p style="text-align: center;"><b>General Session 5   Ballroom A-B</b></p> <p><b>CIO &amp; CTO Business Continuity</b>   JIM LAWRENCE, VP of Operations &amp; Bus. Continuity, CU*Answers RON MARTIN, IT Manager, CU*SOUTH</p> <p><b>cuasterisk.com Network Panel Discussion</b>  </p> <p style="text-align: right;">DERRICK SMITH, President, CU*SOUTH LARRY HAYES, President &amp; CEO, CU*NorthWest LIZ WINNINGER, CEO, Xtend, Inc. MARK FIERRO, CEO, eDOC Innovations GEOFF JOHNSON, CEO, CU*Answers</p>			
12:00   1:00 PM		Lunch   Emerald Coast Room, 2nd Floor		Sponsored By: 	
1:00   1:45 PM	<b>Breakout Session 4A   Ballroom A-B</b>		<b>Breakout Session 4B   Salon C</b>		<b>Breakout Session 4C   Salon D-F</b>
	<p style="text-align: center;"><b>Debit Card Payments</b></p> <p style="text-align: center;">BRUCE HOPKINS</p> <p>SVP of Processing Solutions, SHAZAM</p>		<p style="text-align: center;"><b>BSA Compliance Annual Training</b></p> <p style="text-align: center;">MICHELE GONZALES</p> <p>Accounting Services Mgr., CU*SOUTH (Repeat of Day 1   Breakout Session 2B)</p>		<p style="text-align: center;"><b>Digital Communication</b></p> <p style="text-align: center;">DAVID NORTON</p> <p>Chief Revenue Officer, Eltropy</p>
1:45   2:00 PM		<b>Break</b>			
2:00   2:45 PM	<b>Breakout Session 5A   Ballroom A-B</b>		<b>Breakout Session 5B   Salon C</b>		<b>Breakout Session 5C   Salon D-F</b>
	<p style="text-align: center;"><b>AdvantageCIO</b></p> <p style="text-align: center;">JIM LAWRENCE</p> <p>VP of Operations &amp; Bus. Continuity, CU*Answers</p>		<p style="text-align: center;"><b>Debit Card Security</b></p> <p style="text-align: center;">MEGAN RAMOS</p> <p>Client Dev. Consultant, CU*SOUTH</p>		<p style="text-align: center;"><b>The Community of Xtend</b></p> <p style="text-align: center;">LIZ WINNINGER</p> <p>CEO, Xtend, Inc.</p>
2:45   3:00 PM		<b>Break</b>			
3:00   3:15 PM		<b>Closing   2022 Visionary Conference</b>			
3:15   4:15 PM		<b>Annual Meeting   CU*SOUTH Shareholders</b>			

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