

What is THE CU STRATEGY SUMMIT?

At the 2019 CU Strategy Summit, we're embracing change and exploring innovative strategies to help move your credit union forward. You'll experience sessions packed with actionable ideas that inspire growth and innovation. You'll hear thought-leaders that give new insight and perspectives to the challenges in a rapidly evolving industry. You'll engage in meaningful discussions with your peers to discover how to stay relevant and thrive.

Take a look at some of the highlights of this year's CU Strategy Summit. Then, sign up today to join us in New Orleans!



Question the "because we've always done it that way" mentality and move beyond your comfort zone to accept and adapt to the next generation of financial consumers.



Learn which fraud areas pose the biggest risk to your credit union in today's "connected" environment.



Discover how digital banking will evolve over the next 10 years and how credit unions can successfully compete in the FinTech space.



Take part in breakout sessions on succession planning, risk management, staying relevant with Millennials, and navigating Postal issues.



Find out why small credit unions are essential to our industry and how they can have a big impact on members' lives and their community at large.



Leave the Strategy Summit feeling inspired, energized and with a renewed sense of purpose...



For more information:
call: (858) 792-3883
email: ncpcu@ncpcu.org
web: www.ncpcu.org

2019 CU STRATEGY SUMMIT

APRIL 10-12, 2019 | DOUBLETREE NEW ORLEANS



New Orleans
Louisiana



Photos by Zack Smith Photography, Courtesy of French Quarter Festivals, Inc and New Orleans Convention & Visitors Bureau

NCPCU.ORG

Summit Agenda

> WEDNESDAY, APRIL 10, 2019

- 6:30 am – 1:30 pm Golf Outing at Lakewood Golf Club (optional)
- 1:00 pm – 5:30 pm Conference Check-in
- 2:30 pm – 4:30 pm *Bank Secrecy Act Training Session*
Sidney Parfait, CPA, CEO, POECU
- 5:30 pm – 7:00 pm “Welcome to New Orleans” Buffet Dinner

> THURSDAY, APRIL 11, 2019

- 8:00 am – 8:45 am Breakfast
- 9:00 am – 10:30 am *Embracing the Change Necessary to Achieve Growth*
Patrick Adams, CEO, St. Louis Community CU
- 10:30 am – 10:45 am Networking Break
- 10:45 am – 12:00 pm *How will Digital Banking Evolve Over the Next 10 Years?*
Nikhil Lakhanpal, Co-Founder, Narmi
- 12:00 pm – 1:00 pm Networking Luncheon
- 1:00 pm – 2:30 pm Breakout Sessions:
 - > *Risk Management for CEOs & Managers*
Joe Zito, Doeren Mayhew
 - > *Succession Planning for Success*
Dan Strandy, Category6 Speakers

> FRIDAY, APRIL 12, 2019

- 8:00 am – 8:45 am Breakfast
- 9:00 am – 10:30 am *Small Credit Unions: How To Succeed In A Changing Market*
Amanda Thomas, Founder & President, TwoScore
- 10:30 am – 10:45 am Networking Break
- 10:45 am – 12:00 pm *Putting the Brakes on Fraud in Today's Connected Environment*
Joni Lovingood, Corp. P&C Specialist, CUNA Mutual
- 12:00 pm – 1:00 pm Networking Luncheon
- 1:00 pm – 2:30 pm Breakout Sessions:
 - > *Millennial Influencers*, Panelists TBA
 - > *Postal Roundtable*
- 2:45 pm - 3:15 pm Annual Business Meeting



> BONUS BSA TRAINING

Back by popular demand, this year's program also includes a Bank Secrecy Act session to satisfy the annual BSA training requirement for credit union management and directors.

> FEATURED SPEAKERS



PATRICK ADAMS has devoted over 30 years to the credit union movement and has been CEO for St. Louis Community CU since 2008. He challenges audiences to question “the way we’ve always done it” and embrace the change necessary to achieve growth. Patrick passionately shares the strategies that have elevated St. Louis Community to stand at the highest level of name recognition/brand awareness among St. Louis city residents.



NIKHIL LAKHANPAL was CEO of one of the largest student-run financial cooperatives—the Georgetown University Credit Union—when he recognized the need for a better mobile banking platform for community financial institutions. He went on to co-found Narmi to create a superior digital banking platform. He shares his vision for the future of FinTech and how credit unions can be successful in the digital space.



AMANDA THOMAS is a credit union veteran with years of marketing experience in credit unions ranging from \$37 million to \$200 million in assets. Her unique approach to marketing and passion for organizational culture and employee engagement has made her consulting firm TwoScore a vital partner of many credit unions across the United States.



FRENCH QUARTER FESTIVAL

STARTS THURSDAY, APRIL 11

The award-winning French Quarter Festival is a four-day local music showcase located throughout New Orleans' French Quarter. It's the largest free music event in the United States and features:

- > 1,700 musicians playing 400 hours of free, local music from a variety of musical genres on 23 stages throughout the French Quarter
- > ‘Culinary Lineup’ of food booths operated by some of New Orleans finest restaurants, open throughout the festival weekend

Summit Details

> CONFERENCE HOTEL

DoubleTree by Hilton New Orleans Reservations: (504) 581-1300
300 Canal Street, New Orleans, LA Hotel Room Rate: \$239/night

The DoubleTree by Hilton Hotel New Orleans is conveniently located on Canal Street in the heart of downtown New Orleans. It's walking distance to many of New Orleans's popular attractions including Café Du Monde, the French Quarter, Harrah's Casino and shopping at Canal Place and the Outlet Collection at the Riverwalk. Rooms in the NCPCU block are on a first-come, first-served basis. **Reservations must be made by March 25, 2019** to get the group rate.

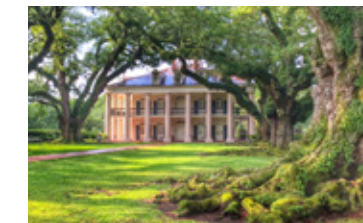
> GROUND TRANSPORTATION

Taxi fare one-way is approximately \$36 from the Louis Armstrong International Airport to the hotel. Airport Shuttle service is available from the airport to downtown hotels for \$24 per person, one-way, or \$44 per person, round-trip. Uber and Lyft are also available. Valet parking at the hotel is \$40 a day. Go to our website at www.ncpcu.org for links to car rental discounts.

> REGISTER EARLY & SAVE!

NCPCU Member by February 21, 2019	\$775
NCPCU Member after February 21, 2019	\$825
First-Time CU Attendee Discount	\$499
Spouse/Guest Program	\$269
Optional Golf Outing at Lakewood	\$110

FIRST-TIME CU ATTENDEES SAVE OVER 40% ON REGISTRATION



SPOUSE/GUEST PROGRAM

Register your spouse/guest to join you for the Welcome Buffet, group breakfasts and the Oak Alley Plantation Tour and lunch. Guests are also welcome to sign up for the optional golf outing on Wed., April 10.

Special Accommodations: If you require special accommodations to fully participate or have special dietary needs, please email a detailed description of your needs prior to the conference to ncpcu@ncpcu.org.

Cancellation Policy: If you need to cancel a registration, send written notice no later than March 20 for a full refund. After March 20, no refunds will be made for cancellations however substitutions are permitted.