

# What is THE CU STRATEGY SUMMIT?

At the 2020 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 Austin!



Take part in breakouts including an interactive forum for CEOs, sessions on the top compliance risks for 2020, BSA training for volunteer directors, and a moderated roundtable on Postal issues.



Learn the seven lending strategies and the success stories of credit unions that have implemented them.



Find out why having meaningful impact in your community and leading through relationships can be essential to your credit union's success.



Hear critical updates from the regulator and a leading credit union economist.



Leave the Strategy Summit with the knowledge, ideas and inspiration to help your credit union grow...



For more information:  
call: (858) 792-3883  
email: [ncpcu@ncpcu.org](mailto:ncpcu@ncpcu.org)  
web: [www.ncpcu.org](http://www.ncpcu.org)

Photo Credit: Austin Convention & Visitors Bureau

# 2020 CU STRATEGY SUMMIT

APRIL 19-21, 2020 | WESTIN AUSTIN DOWNTOWN



NCPCU.ORG

# Summit Agenda

## > SUNDAY, APRIL 19, 2020

- 8:30 am – 2:30 pm Golf Outing (optional)
- 1:00 pm – 5:30 pm Summit Check-in
- 5:30 pm – 7:00 pm “Welcome to Austin” Banquet Dinner

## > MONDAY, APRIL 20, 2020

- 8:00 am – 8:45 am Breakfast
- 9:00 am – 10:30 am *NCUA Update*  
The Honorable Rodney E. Hood (Invited)
- 10:30 am – 10:45 am Networking Break
- 10:45 am – 12:00 pm *U.S. Economic Outlook & Its Impact on Credit Unions*  
Steven W. Rick, Chief Economist, CUNA Mutual Group
- 12:00 pm – 1:00 pm Networking Luncheon
- 1:00 pm – 2:30 pm Breakout Sessions:
  - > *Bank Secrecy Act (BSA) Training*  
Sidney Parfait, CPA, Director, POECU
  - > *CEO Forum Panel*  
Panelists TBA

## > TUESDAY, APRIL 21, 2020

- 8:00 am – 8:45 am Breakfast
- 9:00 am – 10:30 am *Seven Pillars of Lending*  
Brett Christensen, Owner, CU Lending Advice, LLC
- 10:30 am – 10:45 am Networking Break
- 10:45 am – 12:00 pm *Meaningful Community Involvement*  
Tony Budet, President & CEO, University Federal Credit Union
- 12:00 pm – 1:00 pm Networking Luncheon
- 1:00 pm – 2:30 pm Breakout Sessions:
  - > *Top Compliance Issues for Credit Unions*  
Mike Richards, CPA, Richards & Associates
  - > *Postal Roundtable*  
Moderator: Will Yarborough, CEO, USPS Federal CU
- 2:45 pm – 3:15 pm Annual Business Meeting & Summit Wrap-Up



## > 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



**THE HONORABLE RODNEY E. HOOD** is NCUA Board Chairman and also serves as a voting member of the Financial Stability Oversight Council. He represents the NCUA on the Federal Financial Institutions Examination Council and the Financial, Banking Information Infrastructure Committee.



**STEVEN RICK** is a director and the chief economist for CUNA Mutual Group in Madison, Wisconsin. His primary responsibilities include conducting strategic research, analysis, and forecasting of the financial services industry with special emphasis on the consumer and credit union markets.



**BRETT CHRISTENSEN** works directly with credit unions in the U.S. and Canada teaching and consulting with professionals on various lending topics. His personal and entertaining speaking style have made him a popular speaker in the credit union industry.



**TONY BUDET** has been President/CEO of University Federal Credit Union of Austin, Texas, for 17 years. He is a seasoned executive, strategist, and innovator who, during his 33-year tenure with UFCU has held several executive-level roles and has successfully guided the organization through a variety of regulatory, economic, and competitive conditions.



# Summit Details

## > SUMMIT HOTEL

Westin Austin Downtown  
310 East 5th Street, Austin, Texas 78701

Reservations: (512) 391-2333  
Hotel Room Rate: \$249/night

The Westin Austin Downtown is located just one block from 6th Street, a historic entertainment district, located within the city’s urban core in downtown Austin with inspiring cuisines, eclectic shops, and outdoor events. Rooms in the NCPCU block are on a first-come, first-served basis. **Reservations must be made by April 3, 2020** to get the group rate.

## > GROUND TRANSPORTATION

Taxis, shuttles and ride share (Uber, Lyft, etc.) are available from the Austin-Bergstrom International Airport to the The Westin Austin Downtown. Valet parking at the hotel is \$49/day. Links to rental car discounts are available on our website at [www.ncpcu.org](http://www.ncpcu.org)

## > REGISTER EARLY & SAVE!

NCPCU Member by February 28, 2020	\$799
NCPCU Member after February 28, 2020	\$849
<b>First-Time CU Attendee Discount</b>	<b>\$499</b>
Spouse/Guest Program	\$299
Optional Golf Outing	\$120

**FIRST-TIME CU ATTENDEES SAVE OVER 40% ON REGISTRATION**



## SPOUSE/GUEST PROGRAM

Register your spouse/guest to join you for the Welcome Banquet, group breakfasts and an Austin City Tour and lunch. Guests are also welcome to sign up for the optional golf outing on Sunday, April 19.

**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 meeting to [ncpcu@ncpcu.org](mailto:ncpcu@ncpcu.org).

**Cancellation Policy:** If you need to cancel a registration, send written notice no later than March 18 for a full refund. After March 18, no refunds will be made for cancellations however substitutions are permitted.