Explore solutions to tough issues facing your credit union with our team of presenters. Learn from & share ideas with your credit union peers during a roundtable discussion by asset size. Network with fellow board of directors, board chairs, CEOs, supervisory committee members and other credit union professionals from across the country.

Earn CPE credits. Plus! Maximize your educational experience by attending David Reed’s PreConference Workshop: Understanding The Board’s Role In Cybersecurity

Special Savings Available!

- Register BEFORE JULY 28, 2017 and SAVE $150 off full conference rate
- Register 6 or more from your credit union and one participant attends for FREE!
- CEOs receive special pricing

Educating The Credit Union Community exclusively Since 1979

www.cuconferences.com
Optional PreConference Workshop*

• MONDAY, OCTOBER 2, 2017 •

Only $225

Understanding The Board’s Role In Cybersecurity

Presented By David Reed, Attorney, Reed & Jolly, PLLC

The term “cybersecurity” has received a lot of recent media attention, but the bottom line remains that we need to keep our members’ data confidential. Gone are the days when embezzlements, robberies, or forged items were our primary security concerns. Those are still risks to your security — don’t get confused — but the world has gotten so much more complicated. Our credit unions operate in a rapidly changing environment where technology is an essential element of our operations as our members demand more remote services. From Internet banking to mobile banking, from Internet bill paying to a variety of other technology related services, our way of doing business has changed dramatically in the last 10 years.

Are you certain you understand how a data security event will impact your entire credit union? The bottom line remains that we need to keep all our data safe & secure.

Not everyone at your credit union needs to be an IT expert, but everyone, from the newest teller all the way to the chairman of the board, needs to understand the basics of cybersecurity and how to integrate an effective data security program. Recent examination & litigation trends make it clear that the board of directors have a clear responsibility to ensure that the members’ data is protected by their credit union.

Join credit union attorney and volunteer, David Reed, as he discusses the basics of a technology based credit union, latest regulatory developments and future activity in this rapidly evolving area.

This PreConference Workshop Will Cover:
• An overview of directors’ security responsibilities under NCUA Rule Part 748
• Understanding the importance of cybersecurity
• Cybersecurity definitions, examination focus & guidance
• FFIEC guidance and game plan
• From new volunteer to board chair, what cybersecurity should mean to your team

Workshop Takeaways:
• NCUA IT examination questionnaires
• FFIEC cyber risk assessment template
• Cybersecurity resource guide

Plus . . . Earn 3.5 CPE Credits For Attending PreConference Workshop

Maximize Your Credit Union Educational Experience By Choosing To Attend This PreConference Workshop

PreConference Agenda

MONDAY, OCTOBER 2, 2017

11:30 a.m. – 1:00 p.m. PreConference Registration
1:00 – 2:15 p.m. PreConference Session
2:15 – 2:30 p.m. Networking/Refreshment Break
2:30 – 4:30 p.m. PreConference Session (continued)
4:30 – 4:45 p.m. PreConference Wrap-Up

*Separate Registration Required
Although credit unions continue to get stronger and stronger; it is imperative that you receive the highest quality of education to help better yourself and your credit union. CU Conferences’ 38th Annual National Directors Roundtable Conference paves the way for your credit union’s continued success by providing practical ideas and proven strategies that will take your credit union to the next level.

Who Needs To Attend . . .

Credit Union Board Chairs ▼ Board of Directors ▼ CEOs ▼ Supervisory Committee Members ▼ Senior Management ▼ Other Credit Union Leaders From Across The Country

Register Early To Receive Great Savings! Plus, Save Even More . . .

When you register 6 or more participants from your credit union’s leadership team One Participant Attends This Important Conference FREE! Call CU Conferences at 888-465-6010 to register 6 or more participants.

Hold Your Board Meeting At Paris Las Vegas!

• Complimentary Meeting Space
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• Give Us A Call At 888-465-6010 And We Will Assist You In Coordinating Your Board Meeting

Only 5 Boardrooms Available!

Paving The Way For Your Credit Union’s Continued Success

MONDAY, EVENING, OCTOBER 2, 2017

Tentative Schedule – subject to change
Your registered guest is welcome to join you at these (GP) events

2:00 – 5:30 p.m. Conference Registration

5:00 – 6:30 p.m. (GP) Welcome Reception
Join “The Ones In Red.”
your credit union peers from across the country and their guests for cocktails, light dining and great conversation!

Earn 15.5 CPE Credits For Attending This Conference
8:00 – 9:00 a.m.  CU Conferences’ 38th Annual National Directors Roundtable Conference  ▼ Registration ▼

8:00 – 9:00 a.m.  (GP)  Sit-Down Breakfast

9:00 – 9:15 a.m.  Opening Remarks

9:15 – 10:15 a.m.  5 Strategic Levers To Drive Earnings  
James Schenck  
President/CEO  
PenFed Credit Union

There are only five strategic levers that credit union boards and management teams can control to drive earnings:

- Income on assets  
- Operating expenses  
- Non-interest income  
- Loan losses  
- Cost of funds

In this session, James Schenk leads you on an exploration of how you can move these levers in different combinations to achieve your desired results.

10:15 – 10:35 a.m.  Networking/Refreshment Break

10:35 – 11:35 a.m.  Robert’s Rules Of Order  
Tom Glatt, Jr.  
Executive Consultant/Owner  
Glatt Consulting Group, Inc.

For a tool that is supposed to make board meetings simple, efficient and effective, Robert’s Rules of Order often seems to fall short. In fact, it’s a source of frustration for many credit union boards. But while it may be tempting to ignore Robert’s Rules altogether, the tool really does help boards focus on the issues at hand if used properly.

For most credit unions the problem with Robert’s Rules of Order isn’t with the rules themselves, but the lack of training board members receive in how to work within the rules.

Credit union board consultant Tom Glatt, Jr. will lead you through the specifics of Robert’s Rules of Order, teaching you the rules, features, functions, tools and terms — and in the process will help build your confidence as an authoritative and effective credit union director.

11:40 a.m. – 12:40 p.m.  Holistic Leadership: Leading For Growth & Profitability  
Celeste Cook, President/CEO, CU Strategies

PART ONE – In an uncertain economic climate, credit unions must look for ways to become more innovative in their efforts to lead their institutions to greater success . . . increased membership growth, loan growth and profitability. Explore a holistic approach to growth to help navigate your credit union through change to ensure strong growth and profitability in this volatile economic environment.

- Investigating key leadership strategies for growth  
- Defining a strong brand from the board level to the teller level  
- Exploring a holistic leadership approach to membership growth, loan growth and profitability  
- Identifying strategic planning best practices for growth  
- Determining the best approach to get staff engaged to help grow your credit union

12:40 – 1:50 p.m.  (GP)  Sit-Down Luncheon

1:50 – 2:50 p.m.  Holistic Leadership: Leading For Growth & Profitability

PART TWO – Rejoin Celeste Cook as she resumes her timely exploration of a holistic leadership approach that has proven to positively impact the growth of credit unions with a focus on membership growth, loan growth and profitability for long-term sustainability.

2:55 – 3:55 p.m.  Top 100 CUs In ROA  
Rory Rowland, President, Rowland Consulting

Competition is intense, and one way to stay a step ahead of the pack is by knowing how to boost the bottom line. In keeping with the credit union philosophy of “People helping people,” how do the best credit unions increase net income so they can grow? To paraphrase the Old Prospector, “There’s gold in them thar income statements.”

Rory Rowland will show you how to boost the bottom line while keeping the vision of “People helping people.”

3:55 – 4:15 p.m.  Daily Wrap-Up
7:45 – 8:45 a.m.  (GP)  (☼)

Exclusive CEO/Chair Sit-Down Breakfast
Start your day with a delicious sit-down breakfast & exclusive networking opportunity.
(☼)  Strictly For CEOs, Chairs
And Their Registered Guests

7:45 – 8:45 a.m.  (GP)  Sit-Down Breakfast

8:45 – 9:00 a.m.  Opening Remarks

9:00 – 10:00 a.m.

Economic Update

Steven Rick, Director/Chief Economist, CUNA Mutual Group

Join Steve Rick as he discusses how the global economy, the overall financial sector and the Federal Reserve will affect the U.S. economy, interest rates and ultimately your credit union’s balance sheet and earnings performance.

Steve will analyze and establish standards against which your credit union’s own performance can be measured. He’ll also share his views on how to identify trends of savings and loan activity, and he’ll weigh the influence of future economic events on growth.

10:00 – 10:20 a.m.  Networking/Refreshment Break

10:20 – 11:20 a.m.

Roundtable Discussion
By Asset Size

One of the most valuable aspects of attending a conference is the opportunity to network with other credit union professionals from across the country. Networking with those from credit unions of similar asset size is even a greater benefit.

Learn from & share ideas with fellow attendees during this lively roundtable session about pressing issues facing credit unions.

11:20 a.m. – 12:20 p.m.

NCUA Update

J. Mark McWatters, Acting Chairman, NCUA – Invited –

The Honorable J. Mark McWatters has been invited to discuss the NCUA updates with our group.

12:20 – 1:40 p.m.  (GP)  Sit-Down Luncheon

1:40 – 2:50 p.m.

How Board Members Should Evaluate Lending Performance

Brett Christensen, Owner, CU Lending Advice, LLC

Simply stated, a strong lending operation will bring your credit union financial success, while poor lending practices can put it out of business.

A board of directors should receive monthly reports and narrative from senior management that will ensure that your credit union is running a sound and profitable lending operation without micromanaging the daily process of lending and collections.

In this presentation, you will learn which information a board needs from senior management to ensure that your lending operation is safe and sound. You’ll also study best practices that will bring your credit union lending and sales success.

2:55 – 3:55 p.m.

Mobile Banking: It’s Not Just For Millennials

Mansel Guerry, President/CEO, CU 24

According to the Pew Research Center, a whopping 92 percent of men and women aged 18 to 29 have a smartphone. Well, no surprise there. But perhaps it would surprise you to know that 81 percent of men and women between the ages 30 and 64 do as well.

While the number isn’t as high as it is for Millennials, it is barely a double-digit drop off—and it’s still more than 8 out of 10.

In this timely discussion, CU 24 CEO, Mansel Guerry, will explore why it’s more important than ever to recognize that all ages present wonderful opportunities for mobile banking in terms of transactions, marketing and beyond into the future of the credit union movement.

3:55 – 4:15 p.m.  Daily Wrap-Up
7:30 – 8:30 a.m. (GP) Sit-Down Breakfast
8:30 – 8:40 a.m. Opening Remarks
8:40 – 9:40 a.m. Five Signs Your Credit Union Is Heading To Mediocrity

Mark Arnold, President, On The Mark

PART ONE – In his book Onward, Howard Schultz, chairman & CEO of Starbucks wrote, “The damage was slow and quiet, incremental, like a single loose strand that unravels a sweater inch by inch.”

Is your credit union unraveling inch by inch? Downward shifts at credit unions rarely happen overnight. In many cases, negative trends take place slowly. While we might think our credit union is performing well, perhaps it is actually heading away from greatness and sliding into mediocrity.

Mark Arnold will provide thoughtful insights for ways your credit union can move forward instead of backwards.

9:40 – 10:00 a.m. Networking/Refreshment Break
10:00 – 10:45 a.m. Five Signs Your Credit Union Is Heading To Mediocrity

PART TWO – Join Mark Arnold as he continues to reveal the five signs your credit union is heading into mediocrity:

• Your focus is on numbers and not members
• Board meetings focus on the past and not the future
• Your credit union has not offered a new product in the last year
• You’re plagued by “Groundhog Day Syndrome” — doing the same thing over and over again
• You’re experiencing the “accumulation” effect

10:50 – 11:50 a.m. Leveraging Millennials In The Workplace

Nancy Lewis, MS, SHRM-CP, PHR, RCC, President, Progressive Techniques, Inc.

Nancy is the co-author of the book, “Millennials and Beyond-Making the Leap from Texting to Talking.” You will have the opportunity to purchase a signed copy of Nancy’s book at the conclusion of her session.

Millennials are changing the landscape for business with their digital savvy, innovation and creativity. In 2020, statistics state that millennials will make up 50% of the workplace and most organizations are not prepared for this influx. It is critical to know how to leverage millennials on your boards, in the workplace and gaining them as members. Synergy is created when mature & younger employees work together utilizing their talents, skills and abilities which lead to increased productivity, performance and profitability for the organization.

For credit unions to continue to thrive, it is essential that millennials are integrated in every aspect of the business. This session will provide the necessary essentials for leading and engaging this generational cohort group while sharing practical insights on business etiquette for the millennials.

11:50 a.m. – 12:00 p.m. Conference Wrap-Up

This exploration will continue after a brief networking/refreshment break.

FRIDAY, OCTOBER 6, 2017

TRAVEL DAY

Have A Safe Trip Home!

Register Early To Receive Great Savings! Plus, Save Even More . . .

Register 6 or more participants from your credit union’s leadership team and One Participant Attends Free! Call CU Conferences at 888-465-6010 to register 6 or more participants.
**HOTEL ACCOMMODATIONS:**

3655 S. LAS VEGAS BLVD. • LAS VEGAS, NEVADA

Paris Las Vegas offers endless opportunities to compliment your conference experience. The center of the action is the exciting casino set amid authentic Parisian street scenes with quaint cobblestone pathways illuminated by wrought iron street lamps. Three of the 50-story Eiffel Tower replica’s massive legs rise from the casino floor up through a 40-foot hand-painted ceiling of a Parisian sky at twilight. Ride the elevator up for delicious dining & stunning views of the Strip, enjoy fresh air & sunshine on the 2-acre rooftop pool or peruse Le Boulevard’s exclusive shops and french boutiques before retiring to your guestroom complete with sumptuous fabrics, custom European furniture and a plush marble bathroom.

Make Reservations Early!

Book your accommodations online via a special link: [www.cuconferences.com](http://www.cuconferences.com) or by calling Paris Las Vegas: 877-603-4389. Please mention CU Conferences’ code SPCUC7 to receive special rates starting at $169. 

※ Special room rates are per-night & based on availability. A $29 per night resort fee is additional.

**CPE CREDITS:**

CU Conferences® is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit.

Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

For more information regarding administrative policies such as complaints and refunds, contact our office at 888-465-6010.

Level of Knowledge . . . . . . . . Overview
Prerequisite . . . . . . . . . . . . . . None
Recommended CPE Credits . . PreConference & Conference: 19
Method of Presentation (group and live) . . . . . . . . Lectures And Workshops
Cancellation Policy . . . . . . . . Full refund 10 business days before conference start, less $50 administrative fee. Contact Don Berra at 888-465-6010

**GUEST PROGRAM (GP) — Only $299!**

CU Conferences® 38th Annual National Directors Roundtable Conference® Guest Program enables your registered guest(s) to join you during Monday’s Welcome Reception, Tuesday’s Sit-Down Breakfast & Luncheon, Wednesday’s Sit-Down Breakfast or Exclusive CEO/Board Chair Sit-Down Breakfast (♀), Wednesday’s Sit-Down Luncheon, and Thursday’s Sit-Down Breakfast.

※ Separate Registration Required

**TRAVEL INFORMATION:**

For assistance with airfare and car rental please call Altair Travel & Cruises: 800-264-3316 Monday – Friday; 8:30 a.m. – 5:00 p.m. CST. (Nominal Service Fee Applies)

**Hold Your Board Meeting At Paris Las Vegas!**

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- Only 5 Boardrooms Available! -
38th Annual National Directors Roundtable Conference
Paving The Way For Your Credit Union’s Continued Success • October 2 – 6, 2017 • Paris Las Vegas

Special CEO Savings
Yes, Our CEO will attend this conference at the special rate!

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CEO Subtotal: ____________

Register Before July 28th And Save $150

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3rd Participant Subtotal: ____________

TOTAL AMOUNT DUE: (Based On PreConference, Conference Registration Date Selected & Guest Program) ____________

Save Even More! . . . Register 6 Or More Participants From Your Credit Union’s Leadership Team And One Participant Attends FREE!
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CREDIT UNION INFORMATION:
Credit Union Name: __________________________ Asset Size: ________
Contact Person: __________________________ Contact Person’s E-mail: __________________________
Street Address: __________________________ City: __________________________ State: ________ Zip: ________
Phone Number: (_____ ) _____-______ Fax Number: (_____ ) _____-______

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