



The Power of Local/Regional Networking Groups for CUSO and Investment Program Executives

NACUSO Annual Conference
April 27 – 30, 2008

Panelist Introductions...

- Introduction of Panelists
 - Bill Partin, SVP & Chief Member Services Officer - Partners FCU (Previously VISTA Credit Union)



- Sandra deChastain, CFP, VP Investments

OCTFCU

is now

SchoolsFirst
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Session Overview...

- The case to be made for local/regional networking groups for CUSO & Investment Program Executives
- Advocacy and Support for PMA's from NACUSO
- Hearing directly from our panelists
- Next Steps...

Making the Case....

- Collaboration thru networking is not new for us in Credit Union Land. We are “built” to network!
 - There exist today numerous local and regional networking groups for areas like HR, Real Estate Lending, Collections, Auto Lending, IT and others...
- Individual credit unions do not have the scale that our competitors do. Collaborating networking can provide to us an element of scale that ultimately surpasses that of what wirehouse and large bank programs have today because of how the credit union industry is in fact structured.
- We can go to only so many conferences as we are all watching the total return to our members!
- I don't think in today's challenging market that our conference budgets are getting bigger..... 😊

Making the Case...

- There never seems to be enough “networking time” at conferences to really get into the meat of the issues that we all want to talk thru!
- After returning from conferences we generally need to get caught up – quickly!
- Running investment services and other CUSO type programs has become quite complex and challenging. Regular collaboration with local/regional peers can be extremely beneficial.
 - What’s working....
 - What’s not working...
 - Sharing the details of the best practices of others...



Advocacy and Support from NACUSO

- NACUSO is very supportive and embracing of what a group of Southern California Credit Unions have accomplished with the creation of their local/regional PMA called “CUPMA.”
 - They meet quarterly at a host credit union;
 - They have an annual meeting where other investment program and CUSO Executives from across the country participate.



Advocacy and Support from NACUSO

- NACUSO is committed to the value proposition that PMA's like CUPMA have brought to the participating credit unions.
- We believe that the formation of other PMA's like CUPMA across the country will bring to credit unions across the country the same value add to all;
- As part of NACUSO's FSAB ("Financial Services Advisory Board"), the FSAB and NACUSO will be seeking out interested investment program and CUSO Executives across the country to launch additional local/regional PMA's like what CUPMA has done in Southern California.

Hearing From Our Panelists...

- Sandra deChastain.....
- Bill Partin...

Next Steps...

Those that are interested in launching other PMA's across the country please contact Pete Snyder after this session or by email or phone once you get back to your offices.

Pete Snyder

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