



2022 NACUSO Network Conference

April 25 - 28 | Disney's Yacht & Beach Club Resorts



Conference Schedule (updated 4/20)

NACUSO Conference Registration & Information Desk: **Asbury Rotunda**
 Monday's Opening Welcome Reception (Spouses welcome): **Grand Harbor South Ballroom**
 General Sessions & Next Big Idea Competition: **Grand Harbor North Ballroom**
 Networking Exhibits Lounge & Hospitality Receptions: **Grand Harbor South Ballroom**
 Breakfasts & Lunches: **Grand Harbor South Ballroom & Outdoor Seating Available**
 Breakout Sessions: **Asbury A, Asbury B, Asbury C, Asbury D and Hampton**

Event Schedule Monday, April 25.....

7:00 am to 1:00 pm	Shuttle departs for Golf Outing at Disney Magnolia Golf Course	Porte Cochere
10:00 am to 4:30 pm	Exhibitor Set-up for Networking Exhibits Lounge	Grand Harbor South
12:30 pm to 7:00 pm	Conference Registration & Information Desk Open	Asbury Rotunda
1:00 pm to 1:30 pm	General Session: New Attendee Orientation	Asbury A/B
1:45 pm to 2:30 pm	General Session: Hot Topics for CUs & CUSOs in 2022 Messick Lauer & Smith PC: Mike Heller, Brian Lauer, Michael Mulvey and Jennifer Winston	Asbury A/B
2:45 pm to 3:30 pm	(4) Breakout Sessions	
CEO/Entrepreneur:	Growth Only Comes from Better Questions Todd Weiden, Director of Strategic + Business Transformation	Asbury A/B
Insurance Services:	Property and Casualty Compensation Strategies Nick Bloxham, SELCO Group, Christopher Federici, Maps CU, Dennis Freire, LeavittLink Services, Inc. and Ken Potter, Apollo Insurance Services	Asbury C
CUSO Challenge:	When & Why Your Strategic Partner Must Be a CUSO Adrian Dominguez, CU Alliance, Amber Harsin, Prodigy, Vic Pantea, CU*Answers and Liz Winninger, Xtend	Asbury D
MBL/Mortgage:	Future of e-Close Mike Cafferky, Fannie Mae and Omar Jordan, LenderClose	Hampton
3:45 pm to 4:30 pm	(4) Breakout Sessions	
CEO/Entrepreneur:	Four Formidable Forces Shaping the Digital Landscape for Credit Unions Kevin Polinsky, CUNA Mutual Group	Asbury A/B
Insurance Services:	Title Insurance CUSO Case Study Nick Bloxham, SELCO Group, Mona Russell, Suncoast Credit Union and Debbie Whittaker, Members Title Agency	Asbury C
Data Analytics:	5 Things You Need to Know to be Data Successful with a Credit Union Anne Legg, THRIVE Strategic Services	Asbury D
Investment Services:	Matching Member Segmented Services to Advisor Team Development Bonnie Ciuffo, South Carolina Financial Solutions LLC, Kevin Mummau, CUSO Financial Services, and Jennifer Tedder, Cetera Financial Institutions	Hampton

Monday, April 25.....

4:45 pm to 5:30 pm	(4) Breakout Sessions	
FinTech/Operations:	Contact Center - Improve Member Experience and Security without Compromises Milind Borkar, Ph.D., Illuma Labs, Karan Kashyap, Posh Technologies and Rhonda Pavlicek, TDECU	Asbury A/B
Insurance Services:	Roundtable Discussion (pick a topic/table) Compensation Strategies: Christopher Federici and Ken Potter Integrated Quote Technology: Nick Bloxham Just Starting Out: Dennis Freire Title Insurance CUSO: Mona Russell and Debbie Whittaker	Asbury C
Data Analytics:	Building an Innovation Capability Anne Legg, THRIVE Strategic Services	Asbury D
CEO/Entrepreneur:	The Intersection between Financial Inclusion, Financial Well-being, and Data Analytics Victor Miguel Corro, Coopera	Hampton
5:30 pm to 7:00 pm	Networking Exhibits Lounge: Opening Welcome Reception	Grand Harbor South

Event Schedule Tuesday, April 26.....

7:30 am to 6:00 pm	Conference Registration & Information Desk Open	Asbury Rotunda
7:30 am to 9:00 am	Networking Breakfast (outdoor seating available)	Grand Harbor South
7:45 am to 8:45 am	Advocacy Fundraiser Breakfast with Bo Jackson Private Ticketed Event (pre-registration required)	Private Room
9:00 am to 9:30 am	Welcome & Morning Announcements Jack Antonini, NACUSO CEO and Guy Messick, NBS CEO	Grand Harbor North
9:30 am to 10:30 am	General Session: Opening Keynote Bo Jackson, MLB and NFL All-Star	Grand Harbor North
10:30 am to 11:00 am	Networking Exhibits Lounge: Refreshment Break	Grand Harbor South
11:00 am to 11:20 am	NACUSO Annual Members Meeting	Grand Harbor North
11:20 am to Noon	General Session: Regulatory Insights & Industry Update The Honorable Rodney E. Hood, NCUA Board Member	Grand Harbor North
Noon to 1:00 pm	Networking Luncheon (outdoor seating available)	Grand Harbor South
1:00 pm to 1:45 pm	(5) Breakout Sessions	
CEO/Entrepreneur:	Democratizing Investing: Re-engineering Service Models to Capitalize on Technology and the Personal Touch Olivia Eisinger, Apex Fintech Solutions and Justin Steitz, Copper Financial	Asbury A
Investments Services:	Alternative Investments – the CU Swiss Army Knife Mike Downey, CourseMark and Bill Parkinson, CourseMark	Asbury B
Insurance Services:	State of the Industry Tobias Milchereit, MarshBerry and Cara White, AmeriCU Insurance Services	Asbury C
MBL/Mortgage:	Panel Discussion about Strategies to Stay Competitive in the Current Marketplace Adrian Dominguez, CU Alliance LLC, John Giordano, First Heritage Mortgage Services, Larry Jackson, Define Mortgage Solutions LLC and Jeff Vossen, TruHome Solutions LLC	Asbury D
Crypto Currency:	The Crypto Craze: Where and How Should CUs Get Started John Ainsworth, CULedger & Bonifii, Lou Grilli, PSCU, Becky Reed, Lone Star Credit Union, John Ungerland, DaLand CUSO and John Wingate, BankSocial	Grand Harbor North

Tuesday, April 26....

2:00 pm to 2:45 pm	(4) Breakout Sessions	
CEO/Entrepreneur:	Want to Drive Culture, Grab a Mirror or CEO Todd Weiden, Director of Strategic + Business Transformation	Asbury A
Investment Services:	Unlocking the Value of Cross-Departmental Cooperation Kyle Braden, TDECU, Chris Jeppsen, Idaho Central Credit Union and Scott Stathis, Stathis Partners LLC	Asbury B
FinTech/Operations:	Positioning Credit Unions for Growth with Open Banking Pat Pearson, Mastercard	Asbury C
MBL/Mortgage:	Prospering with a Remote Workforce Mark Ritter, MBFS & Nu Direction Lending	Asbury D
2:45 pm to 3:15 pm	Networking Exhibits Lounge: Refreshment Break & Prize Raffles	Grand Harbor South
3:30 pm to 5:00 pm	Next Big Idea Competition	Grand Harbor North
5:00 pm to 6:00 pm	Networking Exhibits Lounge: Hospitality Reception	Grand Harbor South

Event Schedule Wednesday, April 27.....

7:30 am to 6:00 pm	Conference Registration & Information Desk Open	Asbury Rotunda
7:30 am to 8:45 am	Networking Breakfast	Grand Harbor South
8:45 am to 9:15 am	Announcements & CUSO of the Year Awards Presentation	Grand Harbor North
9:15 am to 10:15 am	General Session: The HERO Effect Kevin Brown, Motivational Speaker & Author	Grand Harbor North
10:15 am to 10:45 am	Networking Exhibits Lounge: Refreshment Break	Grand Harbor South
10:45 am to 11:30 am	(5) Breakout Sessions	
CEO/Entrepreneur:	Opportunities in Sale Leasebacks: More Capital, More Investment Returns and More Loans Mitchell Amsler, CU Capital Management and Guy Messick, NBS	Asbury A
Investment Services:	Growth Beyond the Branches: Remote Delivery and Digital Engagement Edward Bronnenberg, Randolph-Brooks FCU and Tim Kehrler, Kehrler Bielan Research & Consulting	Asbury B
CUSO Challenge:	NASCUS Dual Charter Resource Initiative John Kolhoff, Credit Union Department-State of Texas, Vic Pantea, CU*Answers and Amanda Tuckey, NASCUS	Asbury C
Data Analytics:	Data Management is No Longer Just a Data Warehouse & Dashboards Becky Curry, ORNL FCU and Jamie Jackson, Arkatechure CUSO	Asbury D
FinTech/Operations:	The Next-Generation CUSO: New Models for Growth & Innovation April Clobes, Michigan State University FCU, Chris Harper, Filene, John Janclaus, Nymbus and Brian Lauer, Messick Lauer & Smith PC	Grand Harbor North
11:45 am to 12:15 pm	General Session: Ensuring Relevance for Credit Unions The Honorable Kyle S. Hauptman, NCUA Vice Chairman	Grand Harbor North
12:15 pm to 1:15 pm	Networking Luncheon	Grand Harbor South
1:15 pm to 2:00 pm	General Session: The Three Key Investment Themes for the Rest of 2022 Gene Goldman, Economist, Cetera Financial Institutions	Grand Harbor North

Wednesday, April 27....

2:15 pm to 3:00 pm	(4) Breakout Sessions	
FinTech/Operations:	FinTech Founder Perspectives on the new CUSO Lending Rules Sam Das, CMFG Ventures LLC, Nicholas Hinrichsen, WithClutch, Brian Lauer, Messick Lauer & Smith PC, Lee Miller, RenoFi and Steve Muszynski, Splash Financial	Asbury A
Investment Services:	Creating a Holistic Planning Offering for Members Financial Wellness Panel discussion with Zach Porter, Cetera Financial Institutions, Mike Prior, Priority Financial Group, Mindy Seagraves, Tinker FCU and Cara White, AmeriCU	Asbury B
Crypto Currency:	The Future of Payments: Real-time Payments, Open Banking, Bitcoin, CBDC and NFTs. Are We Too Early or Too Late? Sarah Dolan, Michigan State University FCU, Lou Grilli, PSCU and Josh DeTar, Tyfone	Asbury C
Insurance Services:	The Tip of the Iceberg: Diversifying Your Insurance CUSO Dennis Dollar, Dollar Associates, Dale Edwards, Triscend ^{NP} and Kerry Wahlen, Goldenwest Credit Union	Asbury D
3:00 pm to 3:30 pm	Networking Exhibits Lounge: Refreshment Break & Prize Raffles	Grand Harbor South
3:30 pm to 4:15 pm	General Session: The Future of Mobility and How it Impacts Credit Union Lending Tony Boutelle, CU Direct/Origence	Grand Harbor North
4:15 pm to 5:00 pm	(4) Breakout Sessions	
MBL/Mortgage:	The Changing Landscape of Loan Participations Panel Discussion facilitated by Bill Beardsley, Michigan Business Connection Ian Lampl, LoanStreet, RuthAnn Riggs, CU Loan Source and Michael Shafer, Pathways CU	Asbury A
CEO/Entrepreneur:	The Opportunities of Serving Faith Based Organizations and Other Non-Profits with Lending and Financial Services Joe Turner, Ministry Partners Investment Company, LLC	Asbury B
Crypto Currency:	Cryptocurrency CUSO Case Study with NYDIG and OTS Patrick Sells, NYDIG and Jeffrey Staw, OTS	Asbury C
Data Analytics:	Move from Survive Mode to THRIVE Mode: How Focusing on Scalability and Iterative Deployment Can Transform your Credit Union Gordon Flammer, Datava and Breana Wolfert, American Heritage Credit Union	Asbury D
5:00 pm to 6:00 pm	Networking Exhibits Lounge: Hospitality Reception	Grand Harbor South
6:00 pm to 6:30 pm	Exhibitor Tear-down	Grand Harbor South
6:00 pm to 8:00 pm	CU 2.0 & NACUSO Fintech Mini Golf Networking Tournament Private Event (pre-registration required)	Newport Salons A-C

Event Schedule Thursday, April 28.....

7:30 am to 10:30 am	Conference Registration & Information Desk Open	Asbury Rotunda
7:30 am to 10:30 am	Exhibitor Tear-down	Grand Harbor South
7:30 am to 8:15 am	Networking Breakfast	Grand Harbor North
8:15 am to 9:00 am	General Session: 2022 Regulatory Insiders Panel Dennis Dollar, Dollar Associates and Brian Lauer, Messick Lauer & Smith PC	Grand Harbor North
9:00 am to 10:15 am	General Session: Cryptocurrency, Blockchain, and the Future of Financial Services Lamont Black Ph.D., DePaul University, Cryptocurrency & Blockchain Expert	Grand Harbor North
10:30 a.m.	Adjournment	