



PAINTING POSSIBILITIES

NCUL 2023 Annual Meeting & Convention

June 6/7, 2023 Embassy Suites, Lincoln





Nebraska Credit Union League 2023 Annual Meeting & Convention

June 6-7
Embassy Suites 1040 P. St.
Lincoln, Nebraska

SCHEDULE AT A GLANCE

Tuesday, June 6

9:00 a.m.	Golf Outing – Highlands Golf Club
2:00 p.m.	Painting Class – Corky Canvas
6:00 p.m.	Registration Open
6:00 p.m.	YPCU Session
7:00 p.m.	Welcome Reception

Wednesday, June 7

7:15 a.m.	Registration Open
8:15 a.m.	NCUL 89th Annual Meeting
9:30 a.m.	Exhibitor Showcase #1
10:30 a.m.	Opening Session –Steve Rick
11:30 a.m.	Lunch / Exhibitor Showcase # 2
12:15 p.m.	Breakout Sessions
1:15 p.m.	Exhibitor Showcase #3
2:00 p.m.	Breakout Sessions
3:00 p.m.	Closing Session –Sam Glenn
4:15 p.m.	The Return of the Dan Show: Prize Giveaways
5:00 p.m.	The Resolute Group - Invitation Only
6:00 p.m.	Cocktail Reception
6:30 p.m.	Awards Banquet

CONFERENCE OPTIONS

- Participant Package (education sessions/meals/reception/exhibit hall) = \$389
- Spouse/Guest package (meals/reception/exhibit hall) = \$100
- Young Professional (education sessions/meals/reception/exhibit hall) = \$165
- Awards Banquet Only = \$75
- Golf Outing = \$130 per player
- Eagle Member = \$90
- Painting Class = \$50 per artist

**PLEASE
NOTE**

Conference registration is available online only at www.nebrcul.org



Tuesday

Tuesday, 9:00am

Golf Outing – Highlands Golf Club 5501 NW 12th St. Lincoln, NE

Renew your commitment to credit union advocacy by participating in the Annual Meeting Golf Event at Highlands Golf Club in Lincoln. All proceeds go to the NE CU Advocacy Fund. The NE CU Advocacy Fund was founded in 1998 in an effort to proactively protect, preserve and promote Nebraska credit unions in the legislative and regulatory arenas. Cost to golf is \$130 per golfer.

Tuesday, 2:00pm- 4:00pm

Painting Class –Corky Canvas 3700 S. 9th St. Lincoln, NE

Join us at the Corky Canvas where you are sure to uncork your creativity. The Corky Canvas offers a fun way to spend time with old friends or making some new ones while painting your own masterpiece. Oh yeah, don't forget about the wine it helps get the creative juices flowing. All proceeds from the event will benefit CU4Kids. Cost to paint is \$50.00 per person. Limited seating (30).



Tuesday, 6:00pm

YPCU Young Professionals Networking Event

Are you a young professional at your credit union (age 18-35)? Then you should join the YPCU at their FREE networking event!! Join in the fun and meet others in the CU movement just like you. Also, by attending this event, you also gain access to the Exhibitor Reception, which follows this session. Look for more information coming to you via email. Registration is required.





Tuesday, 7:00pm –8:30pm

Exhibitor Welcome Reception

Looking to refresh your current lineup of services? Want to find innovative products that will help reinvent your credit union? Kick-off the Annual Meeting right by networking with peers and learning about exciting new products and services at the always popular Exhibitor Reception.

Wednesday

Wednesday, 8:15am –9:30am

89th NCUL Annual Meeting

Be a part of the League’s 89th Annual Meeting. You will hear updates on the actions of your association over the past year and insight as to what lies ahead.

Wednesday, 9:30am –10:30am

Exhibitor Showcase #1

Enjoy tasty snacks while visiting with exhibitors.

Wednesday, 10:30am –11:30am

Opening Session: 2023 U.S. Economic Forecast and How it will Impact Credit Unions

Steve Rick, chief economist for CUNA Mutual Group, breaks down the latest economic and market data showing a road to recovery with slow growth in the first half of this year.

Presenter: **Steve Rick** is a director and the chief economist for CUNA Mutual Group. He is an economic researcher, analyst and forecaster with an expertise in consumer markets and the credit union industry. Rick's forecasts are the starting point for the strategic planning process and help create a clear understanding of the underlying trends and links between the general economy, the financial services industry, and CUNA Mutual Group's policy owners.

Wednesday, 11:30am –12:15pm

Lunch and Exhibitor Showcase #2

Enjoy lunch and visit with all the convention exhibitors.

Wednesday, 12:15pm –1:15pm

Breakout Sessions. You may choose either of the two breakouts to attend.





Session 1 **InfoSight Hot Topics & Updates**

Take this time to get caught up on hot topics to keep your credit union “in the know.” Hear from an industry expert with insights on what compliance issues are trending now and what to be looking for on the horizon. Bring along questions and leave with valuable perspectives and best practices by interacting with the speaker and peers.

Presenter: **Glory LeDu** is the CEO of League InfoSight and CU Risk Intelligence. Both companies provide compliance and risk management solutions to credit unions nationally, through credit union league/association partners. LeDu’s background includes over 20 years in the financial industry. LeDu is passionate about compliance and regularly provides compliance training to credit union employees, officials and examiners. LeDu also serves on the Board of Directors for a local credit union, CU Vendor Management (CUVM) and for CU Risk Intelligence.

Session 2 **How Credit Unions can Safely Harness the Benefits of AI-Powered Lending Tools**

Credit unions' lending operations face uncertainty and risk in today's rapidly changing economic environment. Technological advances, including AI, can mitigate many of those challenges, but only if they are built well and leveraged responsibly. Come learn how about the key pillars of safe and compliant AI-powered lending tools as well as how AI can help mitigate risk and uncertainty at your credit union.

Presenter: **Theodore “Teddy” Flo**, Chief Legal Officer, Zest AI. For more than a decade, Teddy has served as a trusted legal advisor to consumer financial services companies, including international banks, credit card issuers, mortgage lenders, student loan servicers, and small-dollar lenders. As Zest’s Chief Legal Officer, he works closely with its legal, executive, engineering, data science, sales, and marketing teams to execute on Zest's strategic decisions and ensure that the legal aspects of the company's operations run smoothly, including compliance, litigation, contracting, and intellectual property.

Wednesday, 1:15pm –2:00pm

Exhibitor Showcase #3

Grab some snacks while you make one last round to all the booths and get in those chances to win great prizes!

Wednesday, 2:00pm –3:00pm

Breakout Sessions. You may choose either of the two breakouts to attend.





Session 3
HR Update Post Pandemic

The Latest Labor and Employment Law Developments Impacting Credit Unions: Chad Richter, Omaha Managing Principal at Jackson Lewis, PC and business Partner with the NCUL, will present the latest labor and employment law developments that are impacting credit unions and provide practical pro-active steps to avoid costly employer mistakes.

Presenters: **Chad Richter** is office managing principal of the Omaha, Nebraska, office and the Sioux Falls, South Dakota, office of Jackson Lewis P.C. Chad is also a member of the board of directors. Chad’ practice is divided into three areas: (1) preventive counseling and training; (2) traditional labor law; and (3) workplace litigation. With regard to his preventive practice, he routinely provides day-to-day advice and counseling to management on a variety of employment law matters including human resource management, traditional labor relations, employment discrimination, wage and hour, privacy, disability leave management, and reductions in force.

Session 4
Adapting Your Overdraft Strategy

The NCUA named overdraft/courtesy pay programs a supervisory priority—is your credit union prepared? Evaluating your credit union’s courtesy pay/overdraft program and strategy is vital. In this session, gain valuable insights into how to deliver a pro-consumer and compliant service for your members that supports long-term growth. Learn about the changes in regulatory expectations, requirements, and best practices. Plus, you’ll get tips on mitigating compliance and litigation risks to manage your program more confidently.

Presenter: **Cheryl Lawson**, EVP of Compliance Review. Cheryl serves as JMFA’s principal compliance liaison for regulatory requirements of overdraft services, including consumer protection issues and strategies to enhance safety and soundness. She offers 25-plus years of experience working directly with financial institutions nationwide, providing valuable expertise and keen insight on compliance issues related to overdraft programs.

Wednesday, 3:00pm –4:15pm
Closing Session: Be the Difference!

What does the picture of being the difference look like within your organization? For your leadership?

To be the difference, is to be the exception through your example, empathy, and excellence. Making a positive difference does not happen by accident or without direction.

It requires intention, purpose, and consistency. The focus of this message is about revisiting, reconnecting, and rekindling your purpose in order to elevate the difference you can make each day. Sam will discuss how the little things are the keys to making the biggest difference. When you reflect on those who have made positive differences in your life you often realize it was through small but intentional actions.

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Maybe someone held a door open for you when your hands were full. Perhaps someone stayed an extra hour after work to help you with the workload. Making a difference is the result of your attitude and actions working in alignment. This process is not focused on soft skills or theories, but rather on our life and leadership skills which change and impact the lives of others around us. Sam will share practical and easy-to-implement tools that you can start using immediately. This keynote will have a lasting impact on you, your team, and your entire organization.

Presenter: **Sam Glenn** is most notably sought after for his captivating kick off and wrap up general session speeches. Sam's award-winning speeches set a positive and energetic tone that gets audiences engaged and ready to learn, grow and have fun. Audiences gravitate to his humor, relate to his stories and embrace his relevant ideas for improving their personal and professional life. For nearly three decades, Sam Glenn's inspirational and artistic speeches have impacted audiences of all sizes - some as large as 75,000 people at stadium events.

Wednesday, 4:15pm –5:00pm

The Dan Show

Back by popular demand, it's the Dan Show! Now that you've grabbed all the exhibitor giveaways you possibly could, it's time for Dan and the League to give away some cash and other fabulous booth prizes!

Wednesday, 5:00pm –5:45pm

**The Resolute Group:
Making Technology Possible**

Description – Smaller credit unions oftentimes struggle with keeping up with rapid pace of technology advancements. The challenges include:

Limited Resources: Smaller credit unions often have limited budgets and IT staff. Technology Integration: Smaller credit unions often use a variety of technology tools and systems and integrating these tools can be a challenge.

Cybersecurity: Smaller credit unions are not immune from the increased risk of cyber-attacks but may lack the resources and expertise to adequately protect themselves.

To help credit unions tackle these issues the League has been working with 12-Points Technologies to develop some accessible and affordable solutions for our smaller credit unions. Resolute Credit Unions are invited to join us to learn the details and discuss in greater details needs and desires.

Awards Banquet

Wednesday, 6:00pm –6:30pm

Cocktails

Wednesday, 6:30pm –8:30pm

Dinner

Join us for the Awards Banquet where you will have a grand dinner and you will hear all the wonderful achievements credit unions have accomplished in the past year. Meet and hear from the our CMN artist, Lily!



ADDITIONAL INFORMATION

Hotel Reservations

Individual attendees are responsible for making their own hotel reservations.

The group rate for single or double occupancy is \$164.00 plus tax through **May 15**. A credit card will be needed to guarantee your reservation. To make your reservation online, click on **RESERVATIONS** or by telephone, 1-800-EMBASSY. To receive the group rate, you must mention the Nebraska Credit Union League Annual Convention.

At the Embassy Suites-Downtown Lincoln, every morning, you'll receive complimentary cooked-to-order breakfast served in the beautiful open-air atrium. Also available is a nightly Manager's Reception, offering complimentary drinks and snacks.

Convention Registration and Cancellation Policy

Registration is available online only for the Conference. **Go to www.nebrcul.org to register by May 22nd**. If you need to cancel your convention registration, contact mmausbach@nebrcul.org, 402-333-9331 x201. All requests for refunds must be received on or before May 31st. After the 31st, only 50% of the full registration costs will be refunded. No Shows will be charged in full. Substitutions will be accepted any time.

Dress Code

The dress code for all events is business casual, except for the Awards Banquet which business attire is suggested. We recommend you dress in layers to accommodate the variance in temperatures in the meeting rooms.

Photos during the Event

Throughout educational sessions and social functions, we will be snapping pictures to capture the spirit of the event. Attendees should know that through their attendance, they are granting the League permission to use these group photos in various publications.

Questions? Call the League direct: 402-333-9331 or toll free: 800-950-4455.

