



CUNA Finance Council 3rd Annual CFO Forum

December 5 – 6, 2018
The Westin Nashville, TN

The CFO Forum will bring credit union senior financial executives together to discuss challenges and opportunities facing our industry today. Find out what other credit union financial leaders are talking about in an open forum environment driven from attendee input. The CFO Forum provides an excellent opportunity to network with industry peers.

Finance Executive Committee:

Chair – Steve Arbaugh, CFO
SECU MD

Vice Chair – Andrew McGeorge
CFO, Service CU

2nd Vice Chair - Ashlee Micale, CFO
San Diego County CU

Brad Barnes, CFO
Air Academy FCU

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Mazuma CU

Amy Phillips, CFO
OnTap CU

Bob Schuckmann
Comptroller & Director of Facilities
Heartland CU Association

Brandon Smith, CFO
Reliant FCU

Shari Weber, CFO
Honor CU

Wednesday, December 5	
5:30 - 7:00 pm	Networking Reception <i>Meet all your fellow CFOs</i>
Thursday, December 6	
8:00 - 8:30 am	Networking Breakfast
8:30 - 8:45 am	Welcome and Introduction <i>Steve Arbaugh, Finance Chair</i>
8:45 - 10:00 am	Emerging Risk Stuart M. Richter , Partner, Katten Muchin Rosenman LLP Andrew J. Demko , Partner, Katten Muchin Rosenman LLP Stuart and Andrew will identify and discuss the current litigation and regulatory risks facing credit unions. They will offer ways to avoid or at least mitigate these risks, including changes to business practices, updated disclosures and the risks and benefits of using an arbitration clause. Q&A
10:00 – 10:15 am	Networking Break
10:15 - Noon	Round Table Discussions <i>Topics will be determined by survey results sent to attendees a few weeks prior to forum</i>
Noon - 1:00 pm	Networking Lunch
1:00 - 2:30 pm	Small Group Discussions <i>During the small group discussion, attendees will have the opportunity to examine specific topics with credit unions of similar asset size. Each of the small group discussions will be facilitated by one of our executive committee members.</i>
2:30 - 3:00 pm	Round Table Discussion: What Keeps you up at Night? <i>Do you have sleepless nights? Come prepared to share with the group the issues you have at your credit union that keeps you awake at night.</i>
3:00 – 3:15 pm	Thank You and Parting Words Steve Arbaugh , Finance Chair Conclusion and Attendee requests for follow-up

The unique collaboration of the credit union industry allows this to be a great opportunity to learn ways to take your organization to the next level and develop yourself professionally. The best take away will be the contacts you have made and network you have extended. Contact information of attendees will be provided to encourage future networking.