



CUNA CFO Council

2nd Annual CFO Forum

December 6 – 7, 2017
The Venetian Las Vegas, NV

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.

CFO Executive Committee:

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Comptroller & Director of Facilities
Heartland CU Association

Brandon Smith, CFO
Reliant FCU

Shari Weber, CFO
Honor CU

Wednesday, December 6	
5:30 - 7:00 pm	Networking Reception <i>Meet all your fellow CFOs</i>
Thursday, December 7	
8:00 - 8:30 am	Networking Breakfast
8:30 - 8:45 am	Welcome and Introduction <i>Bryanna Tapley, CFO Chair</i>
8:45 - 9:45 am	State of the Credit Union Industry – Peer Information and Trends Mike Schenk , VP Research & Policy Analysis, Credit Union National Association This session will briefly summarize recent trends in the economy and credit union operations and describe the near-term outlook. This presentation will detail emerging longer-term challenges and potential implications for credit union success. The session will explore the changing nature of success measures and the relevance of peer analysis in the era of big data and data analytics.
9:45 – 10:00 am	Networking Break
10:00 - Noon	Round Table Discussion: <ul style="list-style-type: none"> • CECL • Data Analytics • Emerging Risks
Noon - 1:00 pm	Networking Lunch
1:00 - 2:00 pm	Panel Discussion with Industry Disciplines Mike Atkins , CIO, Bellco CU Chris Oldag , CLO/VP, Pacific Service CU Nader Moghaddam , CEO, Financial Partners CU The one thing that is certain about our industry is that we must continue to change. During this session, our panel from a variety of industry disciplines will share what’s on their minds and what CFO’s need to be aware of. Discussion will be around trends, the competitive landscape, legislative and regulatory issues, and future changes that may be in store from the perspective of each of our panel member’s area of discipline.
2:00 - 3:15 pm	Round Table Discussion: What Keeps you up at Night? Closer to event date, a survey will be sent to registered attendees for their top three “What keep you up at night?” topics.
3:15 – 3:30 pm	Thank You and Parting Words Bryanna Tapley , CFO 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.