# CUNA Finance Council
## 4th Annual CFO Forum
### October 15 - 16, 2019
#### The Westgate Hotel, San Diego, CA

### Finance Executive Committee:
- **Chair** – Steve Arbaugh
  - CFO
  - SECU
- **Vice Chair** – Ashlee Micale
  - EVP/CFO
  - San Diego County CU
- Brad Barnes
  - CFO
  - Air Academy FCU
- David D’Annunzio
  - CFO
  - Truliant FCU
- Susan Gruber
  - EVP/CFO
  - Patelco CU
- Sonya Jaynes
  - CFO
  - Red River EFCU
- Christine Messer
  - VP Accounting
  - Heritage Family CU
- Justin Mouzoukos
  - CFO
  - Mazuma CU
- Amy Phillips
  - CFO
  - On Tap CU
- Brandon Smith
  - CFO
  - Reliant FCU
- Shari Weber
  - CFO
  - Honor CU

### Tuesday, October 15
- **5:00 – 6:30 p.m.**
  - Networking Reception
  - Meet all of your fellow CFOs

### Wednesday, October 16
- **7:30 – 8:00 a.m.**
  - Networking Breakfast
- **8:00 – 8:15 a.m.**
  - Welcome and Introductions
  - Steve Arbaugh, Finance Council Chair
- **8:15 – 9:30 a.m.**
  - The Credit Union of the Twenty-First Century
  - Chris Harper, Sr. Director, Filene Research Institute
  - In this session we’re going to imagine the not-to-distant operating and regulatory future for Credit Unions. We will explore the landscape that is both enabled by technology and altered by changing economic conditions and consumer attitudes.
  - Q&A (last 15 minutes)
- **9:30 – 9:45 a.m.**
  - Networking Break
- **9:45 – 10:45 a.m.**
  - Peer to Peer Introductions and CU Challenges
  - Attendees will get the opportunities to share with the group, who they are, where they are from and the biggest challenge their CU is facing.
- **10:45 a.m. – Noon**
  - Roundtable Discussion
  - Topics will be determined by survey results sent to attendees a few weeks prior to forum.
- **Noon – 1:00 p.m.**
  - Networking Lunch
- **1:00 – 2:15 p.m.**
  - Roundtable Discussion
  - Topics will be determined by survey results sent to attendees a few weeks prior to forum.
- **2:15 – 3:00 p.m.**
  - Moderated Roundtable Discussion: What Keeps You Up at Night?
  - Prior to the meeting, attendees will be surveyed for desired discussion topics.
- **3:00 – 3:15 p.m.**
  - Thank You and Parting Words
  - Steve Arbaugh, Finance Council Chair
  - Conclusion and Attendee request for follow-up