

2017 Accelerating Success Conference & Annual Meeting



Accelerating
SUCCESS

**Omni National Resort
Tucson, AZ
February 15-17, 2017**

 **CATALYST**
Corporate Federal Credit Union

A Universe of Opportunities

2017 CATALYST CORPORATE ACCELERATING SUCCESS CONFERENCE & ANNUAL MEETING

Look Beyond the Challenges.

The financial services universe, like our physical universe, is rapidly expanding and incredibly diverse, with vast regions that are unexplored and sometimes a little scary. Amidst the darkness, however, opportunities exist for those willing to venture beyond the status quo.

Join Catalyst Corporate for the 2017 Accelerating Success Conference and explore opportunities for credit unions through such topics as:

- **Managing (and Embracing) Change**
- **Crafting Superior Experiences for a Diverse Membership**
- **Reaping the Benefits of Innovation**
- **Adjusting for the Economy**

The Accelerating Success Conference begins Thursday morning, February 16, and ends Friday, February 17, just before noon. An optional golf event will be held Wednesday afternoon, February 15.

The multi-day event is a great opportunity to network with other credit union executives to learn how they succeed, as well as connect with Catalyst Corporate executives who can share useful information about services that can help your credit union thrive.

Catalyst Corporate's annual meeting will be held over lunch on February 16 to review its 2016 performance and to outline plans for 2017. Elections also will be held to fill expiring terms on Catalyst Corporate's board of directors. There is no charge to attend the annual meeting; however, registration is required.

HOTEL INFORMATION

Catalyst Corporate's 2017

Annual Meeting & Accelerating Success Conference will be held at:

Omni Tucson National Resort

2727 W Club Drive | Tucson, AZ 85742

Set in the desert and surrounded by the Santa Catalina mountains, this sprawling golf resort is a blend of natural beauty and recreation. An award-winning spa, two pools, three restaurants and a nearby shopping mall make this destination one you are sure to enjoy.

A limited block of rooms is reserved on a first come, first-served basis at \$199 per night. Attendees can make reservations online at www.catalystcorp.org/r/conference. Or, call the toll-free reservation number: 1-800-THE-OMNI (ask for the 2017 Accelerating Success Conference to receive the conference rate).

But hurry, as rooms are limited, and the room rate is good only through January 13, 2017. After that time, the group rate will be offered based on hotel availability only.



SCHEDULE OF EVENTS

WEDNESDAY, FEBRUARY 15

12:30 p.m.	Box Lunch
1:00 – 6:00 p.m.	Golf Outing
6:00 – 6:30 p.m.	Reception

THURSDAY, FEBRUARY 16

8:00 – 9:15 a.m.	Registration & Continental Breakfast
9:15 – 9:30 a.m.	Welcome
9:30 – 10:30 a.m.	Change is Inevitable Jim Kasch
10:30 – 10:45 a.m.	Break
10:45 – 11:45 a.m.	Economic Conditions Facing Credit Unions Steven Rick
Noon – 1:15 p.m.	Catalyst Corporate Annual Meeting and Lunch
1:15 – 1:30 p.m.	Welcome Back
1:30 – 2:30 p.m.	Crafting a Member Experience for People Not Like You Kelly McDonald
2:30 – 2:45 p.m.	Break
2:45 – 3:45 p.m.	Breakout Sessions: Balance Sheet Positioning Steven Houle Mobile Trends Dave DeFazio
3:45 – 4:00 p.m.	Break
4:00 – 5:00 p.m.	Economy Active Mary Kelly
5:00 – 5:15 p.m.	Wrap Up
5:15 – 6:30 p.m.	Reception

FRIDAY, FEBRUARY 17

8:00 – 9:00 a.m.	Continental Breakfast
8:30 – 10:15 a.m.	Panel Discussion: "Becoming Agents for Change" Moderator, Jim Kasch Hear a panel of credit union leaders share how they have boldly championed change and innovation to meet their members' needs.
10:15 – 10:30 a.m.	Break
10:30 – 11:30 a.m.	Brain Food from Big, Bright Minds Mark Meyer
11:30 a.m.	Concluding Remarks

PRESENTATIONS

Change is Inevitable



Jim Kasch

The U.S. population is the youngest it's been in 50 years, while the average age of credit union members has never been older. Credit unions must become relevant to today's younger consumer.

Learn more about the challenges your credit union faces to attract and serve these demanding younger consumers and what credit unions are doing successfully. Jim Kasch has been with credit unions more than 20 years, with roles ranging from teller to CEO, most recently as CEO at Darden Employees FCU in Tampa, Florida. In 2015, he established his own consultancy.

Thurs., 9:30 – 10:30 a.m.

Economic Conditions Facing Credit Unions



Steven Rick

What lies ahead for credit unions in this changing economy? Steven Rick, chief economist

for CUNA Mutual Group in Madison, Wisconsin speaks to recent economic developments in the economy and their implications for unemployment, inflation and GDP growth with special emphasis on the consumer and credit union markets.

Rick publishes the *Credit Union Trends Report*, a monthly "pulse check" on the economic state of the credit union movement. Before joining CMG, he was senior economist for CUNA's Economics & Statistics Department for 22 years.



For updates, visit
www.catalystcorp.org

Crafting a Member Experience for People Not Like You



Kelly McDonald

A "one-size-fits-all" approach is no longer viable in today's competitive business environment. Credit

unions need to recognize members' racial, ethnic, generational, and gender differences with personalized service and marketing.

Credit unions can differentiate themselves in a sea of sameness, while fostering long-term loyalty and brand preference through exceptional and customized member service. Kelly McDonald has 20 years of ad agency experience. Her company, McDonald Marketing, was twice named to the "Top Ad Agencies in the U.S." by *Advertising Age* magazine.

Thurs., 1:30 – 2:30 p.m.

Mobile Trends



Dave DeFazio

Examining the current habits of today's mobile consumers and how credit unions can adjust

their strategies to capitalize on these behaviors. Learn big banks' new game-changing features, the year's most popular mobile banking additions, and see video research from mobile banking customers.

A partner at StrategyCorps, Dave DeFazio works with financial institutions nationwide to deliver top performing mobile and online consumer checking solutions that enhance member engagement and increase fee income.

Thurs., 2:45 – 3:45 p.m.

Balance Sheet Positioning



Steven Houle

What trends have emerged this year that are impacting credit union balance sheets? What might

credit unions expect to see in 2017, and

how can they best position for those changes? Steven Houle offers a wealth of experience in helping credit unions with strategic financial and investment endeavors and specializes in balance sheet management, financial analysis, strategic investing and economic trends.

Houle is vice president of Catalyst Strategic Solutions' advisory service, managing the day-to-day operations of the department and its long-term strategic direction.

Thurs., 2:45 – 3:45 p.m.

Economy Active



Mary Kelly

An uncertain future lies ahead, and credit unions should prepare for challenges under a new administration,

especially when many are already suffering from "change fatigue."

Retired U.S. Navy Commander and Economist Mary Kelly will provide a dynamic analysis of current events and a snapshot of issues credit unions should consider in order to set priorities in the face of change. Kelly has trained over 20,000 military and civilian personnel. She is author of several business and leadership books.

Thurs., 4:00 – 5:00 p.m.

Brain Food from Big, Bright Minds



Mark Meyer

Mark Meyer shares the research findings and innovations of big, bright minds from credit unions

across North America. This CEO of Filene Research Institute leads a team of brilliant thinkers, who deliver research and innovation that inspire people to transform communities and lives through cooperative finance.

An internationally-recognized consumer finance expert, published in dozens of publications, Meyer has advised in the U.S. Department of the Treasury and is a licensed attorney.

Fri., 10:30 – 11:30 a.m.



REGISTRATION INFORMATION



Annual Meeting

There is no charge to attend Catalyst Corporate's 2017 Annual Meeting, but registration is required.

Golf Event

Participants are welcome to join in a round of golf on Wednesday afternoon, February 15, at the world famous course on site. The traditional-style fairways cap a bluff overlooking the beauty of the mountain range, complete with native desert vegetation and strategic fairway bunkering.

Tee time is 1 p.m. The \$150 per person fee includes green fees, cart, reception and lunch. Space is limited.

Register Today

The Accelerating Success Conference is open to all credit unions at a registration fee of \$450 per person. The registration fee includes continental breakfast on Thursday and Friday, lunch on Thursday, a stargazing/networking reception on Thursday evening and available presentation materials. Wednesday's golf outing is an additional fee.

Attire

Business casual



Discounts *Cannot be combined.*

- **Early Bird:** Member credit unions can take advantage of a special \$375 Early Bird Discount if registered by Friday, January 13.
- **Groups:** Credit unions with more than four attendees will receive \$100 off the regular registration fee of \$450 for each attendee (\$350 per person).
- **Small Credit Unions:** Credit unions with assets of \$30 million or less may attend the Accelerating Success Conference at a discounted rate of \$250 per person.

Payment Arrangements

Registration fees will be deducted automatically from your Catalyst Corporate account on Thursday, February 16, unless other arrangements are made in advance.

Cancellation Policy

By Friday, January 13, 100% refund;
By Friday, January 20, 50% refund;
After January 20, no refunds.
Substitutions are always welcome.

Contact

If you have additional questions or special needs, contact Linda Dowdy at 800-442-5763, ext. 7843, or email conference@catalystcorp.org.

CPE Credit

Catalyst Corporate will award up to 8 CPE credits in the Economics and Marketing fields of study for attendance at this year's Accelerating Success Conference. These courses are group live events with a basic program level. No prerequisite or advance preparation is required. Speakers provide an overview of the subject matter. From economists and other industry experts, attendees will be able to identify critical elements and classical principles of economics and define internal and external marketing strategies to improve the member experience.

For more information regarding CPE credits, please contact Cindy Shipp, Training Manager, at **800-442-5763, ext. 7835**.

Catalyst Corporate Federal Credit Union is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Concerns regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.



Register Online: www.catalystcorp.org/r/conference