

NEWS

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For More Information

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CCUA and CULCT Kick off Annual APEX Conference at Mohegan Sun

The Cooperative Credit Union Association (CCUA) and the Credit Union League of Connecticut (CULCT) welcomed nearly 700 credit union professionals from five different states to Mohegan Sun for the annual APEX industry conference.

This is the third consecutive year that the CCUA and CULCT teamed up to host the convention-level extravaganza bringing credit union professionals, business partners, sponsors, volunteers, and industry experts for three action packed days of networking, professional development, and excitement.

"Credit unions live by the people helping people philosophy, and our members truly display that every day. Bringing together credit union leaders from Delaware, Massachusetts, New Hampshire, Rhode Island, and Connecticut with partners and thought leaders from throughout the world helps our attendees enhance their member service, and better support their local communities," **said Ron McLean, President/CEO, of the CCUA.** "Year after year, it is an honor to gather with our members, partners, board members, and supporters at APEX to share ideas and continue our efforts to further the credit union community."

APEX 2023 also includes a trade show featuring a nearly 100 vendors, as well as an assortment of educational sessions, networking opportunities, and celebrations.

"An APEX represents the highest point. This conference offers tremendous value to credit union executives who want to reach even higher. APEX 2023 brings credit unions across five states together for a uniquely valuable and expanded learning opportunity," **stated Bruce Adams, President, and CEO of the CULCT.** "We are thrilled that APEX 2023 is bigger and better than ever with record growth and attendance."

The festivities began on the evening of Tuesday, October 10th with a networking and collaboration reception for the Women's Executive Leadership Network and the Global Women's Leadership Network, with the official opening ceremony starting on Wednesday morning. After a pre-conference learning labs, a heartfelt rendition of the National Anthem, and welcoming remarks by the host organization's CEOs, attendees were enjoyed an inspirational keynote speaker and time with exhibitors.

This year's title sponsor, TruStage, and event sponsors MemberClose and Aluvy, collaborated with the CCUA and CULCT to host the first-class industry event with the overall goal to empower credit unions of all sizes to thrive. APEX concludes with two keynote sessions on Friday, October 13th. For more information visit www.ccua.org/convention or www.culct.coop.

Keynote speaker and learning lab session details:

October 11

- *Dima Ghawi, Executive Coach and Author | Shattering Limitations and Daring to Thrive*: Dima motivates individuals to attain personal and professional growth. Throughout her keynote session, Dima dares individuals to examine their own internal limitations, and provides the tools it takes to emerge empowered.
- *Ancin Cooley, Synergy Credit Union Consulting | Audit/Supervisory Committee Best Policies*: Draw from Cooley's experiences as an examiner, board consultant, internal auditor, and strategic planner providing insight on how Supervisory Committees add value to their organizations.
- *Jamie Resker, Employee Performance Solutions | Conversations to Accelerate Employee Performance Potential | Young Professionals Session*: This program helps organizations transition into a culture of continuous performance management by providing an intuitive conversation framework, cutting-edge tools, and training for all employees. By asking insightful questions, employees can take charge of their own performance and development, while managers can confidently identify strengths, articulate future contributions, and swiftly correct off-target performance.
- *Aaron Long, Zest AI & Nick Leonard, Posh | Unlocking the Power of AI for Small Credit Unions*: Two innovative business partners that work with smaller credit unions connect in this learning lab to unlock the power of AI, and improve the digital experience for both potential and current credit union members. Zest AI and Posh support smaller credit unions with sophisticated technology that was previously almost exclusively adopted by larger financial institutions.
- *Paul Gandolfi, Dolphin Debit Access LLC/Euronet Worldwide | From ATMS to ITMs – What to Consider*: There are many determining factors credit unions need to consider when evaluating if ITMs are really for them. Dolphin Debit helps credit unions gain a better understanding of the ATM and ITM market, and provides the insight on a strategically strong footing for deciding whether to implement ITMs.
- *Crystal Streeper, ViClarity | Emerging Compliance Risks, Challenges, and Opportunities for Small Credit Unions*: There are many factors impacting smaller credit unions, including current compliance risks. This session provides a look at what smaller credit union do well and what areas could use improvements when evaluating risk and compliance programs.
- *Aaron Long, Zest AI, Srinivas Njay, interface.ai, and Steven Bibby, eGain Corporation | Navigating the AI Landscape for Credit Unions*: These innovators delve into the transformative power of artificial intelligence (AI) within the credit union sector. Our distinguished panel speakers of AI, and provides valuable strategies for harnessing its capabilities. Whether you are in the early stages of AI adoption or looking to refine your existing strategy, this session is set to address key pain points, potential solutions, and innovative approaches in credit union operations.

October 12

- *Robert Gibbs, Political & Corporate Communications Expert | Cut Through the Noise: Building an Effective Communications Strategy*: Walk away with actionable lessons and eye-opening insight into what it takes to craft an effective communications strategy in today's unpredictable media and political environment.
- *Bruce Adams, CULCT President/CEO & Richard Gose CUNA CPO | Understanding Your Audience: Effective Advocacy*: Two industry leaders are joined by state lawmakers to dive into credit union advocacy. Simply, Legislators are people too. Find out what they care about and what gets their attention.
- *Tanya Meck, Global Strategy Group | Stop, Spot, and Roll*: Understand the full spectrum overview of the importance of Stopping: putting a communications plan in place before something happens, Spotting: identifying potential crises or actionable events, and Rolling: executing the plan efficiently and effectively.
- *Allison Ebner, Employers Association of the NorthEast | What's Your EVP? Employee MoJo + Accountability = High Performance Cultures*: Explore the four fundamental emotional drivers that underlie motivation, and the actions organizations can take to create an accountability driven reward system that blends peak performance and high employee satisfaction.

- *Jim Olney, Alloya Corporate Federal Credit Union | Navigating the Road to Faster Payments:* In a technology driven society, there are always developments in faster and real-time payments, but what does that mean for credit unions? Develop a roadmap to help merge onto the faster payments highway.
- *Judy Britt, CULCT | BSA Training for Board Members:* Boards must actively keep up with BSA policy, risk assessment, ongoing training, and Suspicious Activity Report filings. This comprehensive overview includes specific actions that credit union boards need to follow.
- *Panel: Isaiah Moskowitz, LTI Business Solutions | Caroline Santangelo, Workers FCU, Edward Zemba, Link to VR | Michael Villafana, Jr, Worcester Red Sox | Unleash the Power of Your Brand through Experiential and Immersive Marketing Experience:* Leveraging innovative new technologies elevate brands and drive engagement. This panel of experts not only tells the marketing and technology story, but shares a live demonstration of the tech in action.

October 13

- *Steven Rick, TruStage | U.S. Economic Outlook & Its Impact on Credit Unions:* Rick's forecasts serve as a starting point for the strategic planning process and help to create a clear understanding of the underlying trends and links between the general economy, the financial services industry, and TruStage's policy owners.
- *Felicity Aston MBE, Explorer, Scientist & Author | Alone in Antarctica:* As the first woman in the world to ski across Antarctica alone, Felicity examines the sources of motivation that drove her forward and talks about the importance of perseverance. Through her thought-provoking keynote, Felicity provides an insight into recognizing and developing resilience.

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About Cooperative Credit Union Association, Inc.

The Cooperative Credit Union Association is a regional trade organization serving as the voice for nearly 180-member credit unions located throughout Delaware, Massachusetts, New Hampshire, and Rhode Island. CCUA member credit unions hold combined assets in excess of \$73 billion and serve a collective membership base of more than 4.7 million consumers. For more information, visit www.CCUA.org.

About The Credit Union League of Connecticut

The Credit Union League of Connecticut serves, advocates for, and advances the interests of Connecticut credit unions in order to support their growth and maximize the positive impact credit unions have on their members, communities, employees, and on all their relationships. For more than 89 years, the Credit Union League of Connecticut has helped its members position for sustainable success and growth through a variety of offerings including government relations, regulatory compliance, executive education, vendor partnerships, and marketing services. To learn more visit www.culct.coop.