

DON'T PANIC, BE PREPARED!

EAST COAST MARKETING & BUSINESS DEVELOPMENT CONFERENCE
& FINANCIAL EDUCATION PRECONFERENCE WORKSHOP

SEPTEMBER 21 - 23, 2016 | HILTON GARDEN INN | VIRGINIA BEACH OCEANFRONT



Brought to you by the Marketing & Business Development Councils of
The Virginia Credit Union League & The Carolinas Credit Union League.

This Conference precedes the Annual Neptune Festival and discounted hotel rates are good through the weekend!

ABOUT THE EVENT

Sometimes being a marketing professional, or any kind of professional in the credit union movement for that matter, can feel like you are swimming in a sea full of sharks! With today's hypercompetitive environment, ever-changing technology, data overload and more, your job can become overwhelming. Members' needs and expectations are changing rapidly and you must be prepared to take them head on.

Join us at the beautiful Virginia Beach Oceanfront to network with credit union peers and learn from industry leaders. The conference and preconference are designed to cover top-of-mind issues marketing, business professionals, financial educators, and other credit union professionals face every day. Attendees will learn the latest best practices in the industry from top-notch speakers and have a ton of fun as well!

Sign up for the full conference (three days) or choose to attend only the Financial Education Preconference Workshop (one day) or the Marketing & Business Development Conference (two days). This conference is packed with education you do not want to miss, while offering tremendous networking opportunities.

SEPT
21

FINANCIAL EDUCATION PRECONFERENCE WORKSHOP

Improve Your Members' Financial Future!

Travis Mountain, Virginia Cooperative Extension

Smart Credit Check: How To Read A Credit Report

Matt Boyer, Retail Alliance

Financial Education Resources For Helping Your Members

Leslie Jones, Consumer Financial Protection Bureau

Get Smart With Money Smart!

Victor Galloway, FDIC

SEPT
22

MARKETING & BUSINESS DEVELOPMENT CONFERENCE

Rock Your Superheroes: (Humans+Superpowers=Motivated Teams)

Melanie Spring, Sisarina

Fishing For Solutions: (Speed Dating Roundtable Format)

What is your most pressing marketing and/or business development challenge?

Top Marketing Trends Every CU Should Know

Taylor Wells, Mark Arnold Strategies

Electronic Strategies For Increasing Product Penetration

Taylor Wells, Mark Arnold Strategies

Optional Event - Escape Room: Forensic Files

SEPT
23

MARKETING & BUSINESS DEVELOPMENT CONFERENCE

Social Media, Credit Unions And Return On Investment

Bryce Roth, ChatterYak

All On Board! Be More Than A Good First Date

Bryn Vaupel, BCC Strategies

Getting Your C-Legs: Living At A Strategic Level

Bryn Vaupel, BCC Strategies

FINANCIAL EDUCATION PRECONFERENCE AGENDA

WEDNESDAY, SEPTEMBER 21

9:30 a.m. - 9:45 a.m.	Welcome
9:45 a.m. - 10:45 a.m.	Improve Your Members' Financial Future! Travis Mountain, Virginia Cooperative Extension
10:45 a.m. - 11:00 a.m.	Break
11:00 a.m. - Noon	Smart Credit Check: How To Read A Credit Report Matt Boyer, Retail Alliance
Noon - 12:45 p.m.	Lunch
12:45 p.m. - 1:45 p.m.	Financial Education Resources For Helping Your Members Leslie Jones, Consumer Financial Protection Bureau
1:45 p.m. - 2 p.m.	Break
2 p.m. - 3 p.m.	Get Smart With Money Smart! Victor Galloway, FDIC

TOPICS

Improve Your Members' Financial Future!

Travis Mountain, Virginia Cooperative Extension

The future of financial education will not only focus on financial knowledge, but also critical thinking skills, self-control, financial self-efficacy, and future orientation. Individuals who possess these skills are more likely to make better financial decisions. Classroom type education, plus experiential learning, can form the cornerstones of these objectives. The combination of Virginia Cooperative Extension's financial education programs such as the Master Financial Education program as well as youth financial simulations such as Reality Store offer a promising start. Partnerships with state and local financial institutions, such as credit unions, can reinforce Extension's financial education message not only during an Extension program but also when a consumer is sitting across the table with a financial representative making an important banking decision.

Smart Credit Check: How To Read A Credit Report

Matt Boyer, Retail Alliance

Want to learn the ins and outs of a credit report? Matt Boyer shares information on:

- How to read and understand a consumer credit report.
- Fair Credit Reporting Act (FCRA) & The Fair Accurate Credit Transactions Act (FACT Act). We will review aspects of the law that creditors must be aware of.
- Scoring: The development of the variables and how to improve one's score. The newest version of the FICO 9 score.
- Ancillary products such as Identity Scan, FirstSearch, OFAC, BNI, Online Directory and SSN Affirm.

Financial Education Resources For Helping Your Members

Leslie Jones, Consumer Financial Protection Bureau

Adults who have high levels of financial well-being feel in control of their day-to-day and month-to-month finances. How do children become adults with high levels of financial well-being? In this session, learn more about CFPB tools and resources you can use to help build financial capability. We will spotlight CFPB's Curriculum Review Tool and teaching pedagogy, a new framework designed to help teachers select learning and teaching strategies that build youth financial capability.

Get Smart With Money Smart!

Victor Galloway, FDIC

This session covers Money Smart, FDIC's Award-winning and free financial education curriculum. The session will provide present and prospective financial education providers information on the range of content presented in the curriculum and the various various formats through which it is provided. The curriculum has been used by financial education professionals nationally with both adults and young adults in a variety of settings, primarily to low- and moderate-income individuals and small business owners

MARKETING AND BUSINESS DEVELOPMENT CONFERENCE AGENDA

THURSDAY, SEPTEMBER 22

8 a.m. - 9 a.m.	Registration / Breakfast / Vendor Exhibits
9 a.m. - 9:15 a.m.	Opening Announcements And Welcome Chris Miller (Mktg & Biz Dev Council Chairman)
9:15 a.m. - 11:15 a.m.	Rock Your Superheroes (Humans+Superpowers=Motivated Teams) Melanie Spring, Sisarina
11:15 a.m. - 11:30 a.m.	Break / Vendor Exhibits
11:30 a.m. - Noon	Fishing For Solutions: (Speed Dating Roundtable Format)
Noon - 1 p.m.	Lunch / Vendor Exhibits
1 p.m. - 2:15 p.m.	Top Marketing Trends Every CU Should Know Taylor Wells, Mark Arnold Strategies
2:15 p.m. - 2:30 p.m.	Break
2:30 p.m. - 4 p.m.	Electronic Strategies For Increasing Product Penetration Taylor Wells, Mark Arnold Strategies
4 p.m. - 6 p.m.	Vendor Reception
8 p.m. - 9 p.m.	Optional Event - Escape Room (Session 1)
9 p.m. - 10 p.m.	Optional Event - Escape Room (Session 2)

FRIDAY, SEPTEMBER 23

8:30 a.m. - 9 a.m.	Continental Breakfast
9 a.m. - 10:30 a.m.	Social Media, Credit Unions And Return On Investment Bryce Roth, ChatterYak
10:30 a.m.-11 a.m.	Checkout Break
11 a.m. - Noon	All On Board! Be More Than A Good First Date Bryn Vaupel, BCC Strategies
Noon - 1 p.m.	Lunch
1 p.m - 2 p.m.	Getting Your C-Legs: Living At A Strategic Level Bryn Vaupel, BCC Strategies
2 p.m.	Wrap Up & Door Prizes

TOPICS

Rock Your Superheroes (Humans+Superpowers=Motivated Teams)

Melanie Spring, Sisarina

Our teams are filled with Superheroes. They bring superpowers with them to work every day, yet most aren't showing them off. Many don't even realize they have them and if they do, they don't know how to hone them. If we're the average of the 5 people we spend the most time with, then we better fill our teams with people who live up to their full potential. This talk will make you take a look the people around you along with your interactions with them. We'll talk about the superheroes who inspire us then we'll start dreaming about what you need to do to live a super-powered, cape-wearing life. Once you rock your superpowers, your whole team can do the same. You'll walk away with:

- Exercises to walk through with your teams
- The motivation to live a superpowered life
- Ideas on how to make the team you have the one you want
- A list of what you need to do on Monday

Fishing for Solutions:

(Speed Dating Roundtable Format)

What is your most pressing marketing and/or business development challenge?

Top Marketing Trends Every CU Should Know

Taylor Wells, Mark Arnold Strategies

Credit unions must become savvy marketing organizations to survive. As a marketing executive and author, Taylor provides thoughtful insights for credit unions to consider. This session examines trends including:

- Digital Strategies
- The Mobile Revolution
- Relevancy
- Branding
- User Experience
- Marketing Audits
- Future CEOs and Marketing
- Evolving Role of Business Development

Electronic Strategies For Increasing Product Penetration

Taylor Wells, Mark Arnold Strategies

As consumers increasingly turned towards digital ways of interacting with their financial institutions, credit unions must in turn find ways to meet them there. Taylor will introduce and explain current thoughts and trends in this area including:

- Active member engagement
- Using what you've got
- New member on-boarding
- Tips and ideas

Social Media, Credit Unions and Return on Investment

Bryce Roth, ChatterYak

While using social media to connect with your members and potential members is not a new idea, many credit union continue to struggle defining success. What is social media success? What does it look like? How can you achieve it? In an ever-changing digital world, how do you justify the time and money that you spend on your social media strategies? In this session, Bryce Roth from Chatter Yak! will answer these questions and much more.

All On Board! Be More Than a Good First Date

Bryn Vaupel

Acquiring a new member is no easy feat. You spend precious resources trying to convey the value of your credit union to potential members. When they agree to membership, you are elated. You fantasize about all the products and services you'll sell them and how you'll increase your share of their wallet. You are going to live happily ever after! But wait, it doesn't seem to work out that way. Members join and you can't seem to get beyond the basics. You need to think about on-boarding like dating. When a new member joins your organization, they have just agreed to a first date. In this session you'll learn how to get the second date, the third and turn that membership into a mutually beneficial and satisfying relationship. You'll also takeaway ideas on how to rekindle old flames by re-engaging with long-term members.

Getting Your C-Legs: Living at a Strategic Level

Bryn Vaupel

Transitioning from being a stellar performer who is great at managing people, projects and resources to the C-suite is a natural progression in most leaders' careers. However, the skills that made you a top performing manager are different than those required of an effective C-suite leader. As an executive in your organization, regardless of the three initials in your title, you need to be constantly looking up and out, managing relationships and focusing on your organization's envisioned future. In this session, you'll learn how to live every day at a strategic level, let go of time consuming tasks and how to lead your team by articulating clear purpose and vision. This topic is ideal for newly promoted executives and those who have been in the C-suite for years but want to be more forward-focused. You'll leave this session with actionable ideas that will help you stay the strategic course and navigate the choppy waters of the C-suite.

Escape Room: Forensic Files

A room full of riddles and mystery awaits you to solve them! Investigate the Crime Scene and discover its secrets. You are a member of an elite team of forensic investigation experts and medical examiners, and you've all been called to investigate a crime scene at the oceanfront. The suspect has covered his tracks to baffle the police, and the victim needs to be identified. Use your intelligence to solve the case! You and your team have 60 minutes to gather the evidence needed to expose the suspect's identity, and uncover the name of the victim. Can you solve the mystery and the escape room in time?

(Limited to 40 people: 10 per room, per session)

Advance Price: \$25 per person

SPEAKER BIOS

Matthew Boyer
Retail Alliance

Matt Boyer is the Vice President of RA Business Solutions. He is a graduate of Old Dominion University's College of Business and Public Administration. Matt has served in several roles involving credit and marketing for over 10 years. In his current role with Retail Alliance, Matt oversees the Business Solutions/Credit Reporting team while managing strategic customers. He currently resides in Virginia Beach with his wife, Kinsey, and their daughters Aidan and Addison.



Victor Galloway
Federal Deposit Insurance Corporation

Victor Galloway serves as a Federal Deposit Insurance Corporation (FDIC) Community Affairs Specialist for North Carolina, Virginia and West Virginia. He and the Community Affairs staff assist financial institutions in developing strategies that are responsive to the credit, service and investment needs of their communities. Victor Galloway has over 20 years Senior Executive Leadership experience with expertise in working across multiple business channels. These include public institutions and government agencies with C-Level Executives, academic leaders, senior White House staffers, congressional members to forge economic development and collaboration among small businesses, major corporations, higher education institutions, and community development practitioners.



Leslie Jones
Consumer Financial Protection Bureau

Leslie Jones joined the CFPB Financial Education team in 2015. She is a former business teacher, instructional designer, curriculum supervisor and developer. She is the Youth Financial Education Analyst at CFPB who advises on all K-12 financial education program issues and the development of national program approaches to support K-12 financial education. Her focus is working with teachers incorporating personal finance topics into their courses.



Travis Mountain
Virginia Cooperative Extension

Travis' area of concentration as an Extension Specialist is the financial and economic well-being of the households and communities of Virginia. His current research interests include life insurance adequacy, food security, and debt behavior including mortgage selection and student loans. He is also a member of the NC 2172 multi-state research team focusing on "behavioral economics and financial decision-making and information management across the lifespan." Currently the team is working on a post-secondary education financing project and has future plans to examine Social Security and retirement.



SPEAKER BIOS

Bryce Roth ChatterYak!

Bryce Roth is the co-founder and President of the marketing and advertising credit union service organization (CUSO), Chatter Yak! LLC. In 2011, Bryce was named a Trailblazer 40 and Below by CU Times and in November 2013, he was named a finalist for the Next Top Credit Union Executive competition. Most recently, Bryce was named one of The Credit Union National Association's Credit Union Rock Stars for 2014. Bryce served on the Wisconsin Credit Union League's YP Advisory Board in 2015. Bryce has a passion for financial literacy, speaking about the importance of the cooperative financial model and of course, talking about marketing, advertising and how credit unions can better integrate and utilize various communication channels to improve their advertising efforts.



Melanie Spring Sisarina

Brand building + hardcore strategy x positivity = Melanie Spring. Melanie is the Chief Inspiration Officer at Sisarina, a DC-based brand strategy agency. She's an entrepreneur, international speaker, and approachable badass spreading the gospel of rocking your brand. Sick of hearing the same old corporate stories, she traveled 7,000 miles in three weeks on the Live Your Brand Tour interviewing businesses of all sizes about what makes them tick. After the stories were published in Entrepreneur Magazine, she became a Contributing Writer and successfully established herself as a branding expert. Sisarina created Brands That Rock, an entrepreneurial tribe of rockstar humans, while Melanie facilitates workshops at Fortune 500 companies. She's truly living her purpose by inspiring others. After listening to her TED-style talks and workshops, you'll have a solid to-do list, bold ideas, and the inspiration to get out there and do something bigger. Find out more at www.melaniespring.com and www.sisarina.com



Bryn Vaupel BCC Strategies

Bryn C. Vaupel, Principal, is an award-winning marketing strategist who has over 15 years of experience serving as a marketing and retail delivery executive for credit unions and non-profit organizations across the country. In 2014, Bryn was honored for her leadership and commitment to making a difference, receiving the Credit Union Times Trailblazer 40 and Below award.



Taylor Wells On the Mark Strategies

Taylor is a veteran of the marketing, public relations, writing, teaching and speaking fields with almost twenty years of experience in a variety of industries. He began his career as a radio news and sports director before transitioning into marketing and public relations roles. While specializing in credit unions and financial institutions, he also offers practical knowledge and insights to share from non-profit, national defense and franchising. Taylor has contributed to a wide variety of regional and national professional trade journals and mass media publications and broadcasts. Taylor holds a Bachelor of Arts (Journalism) degree from Angelo State University. Taylor's scope of knowledge also covers key fields including speaking, branding, strategic planning, corporate communications, social media applications for large and small businesses, business development, entrepreneurship and business start-ups. He is also co-author of the latest book from On The Mark Strategies, *Marked for Success*. While passionate about communications and branding, Taylor's greatest joy and job is fatherhood. He is an active Cub Scout and Girl Scout volunteer, as well as a multi-year youth sports coach, school activities and church volunteer.



REGISTRATION

Register online at www.vacul.org/events and pay by credit card or complete this form and submit it with your payment to:

Virginia Credit Union League
Attention: Dawn Lindley
P.O. Box 11469
Lynchburg, VA 24506

QUESTIONS: Contact Dawn Lindley at 434.237.9617, 800.768.3344 ext. 617, or dlindley@vacul.org.

Two-Day Conference Cost: \$349 for first attendee from your credit union and \$329 for each additional.

One-Day Pre-Conference Cost: \$149 per attendee

Optional Event - Escape Room Cost: \$25 per attendee

CONFERENCE REGISTRATION:

	Sept. 21	Sept. 22-23
Name of Participant: _____	<input type="checkbox"/> Pre-Conference	<input type="checkbox"/> Conference
Name of Participant: _____	<input type="checkbox"/> Pre-Conference	<input type="checkbox"/> Conference
Name of Participant: _____	<input type="checkbox"/> Pre-Conference	<input type="checkbox"/> Conference
Name of Participant: _____	<input type="checkbox"/> Pre-Conference	<input type="checkbox"/> Conference

OPTIONAL EVENT - ESCAPE ROOM:

Name of Participant: _____	<input type="checkbox"/> 8 p.m. session	<input type="checkbox"/> 9 p.m session
Name of Participant: _____	<input type="checkbox"/> 8 p.m. session	<input type="checkbox"/> 9 p.m session
Name of Participant: _____	<input type="checkbox"/> 8 p.m. session	<input type="checkbox"/> 9 p.m session
Name of Participant: _____	<input type="checkbox"/> 8 p.m. session	<input type="checkbox"/> 9 p.m session

Enclosed is a check made payable to the Virginia Credit Union League. \$ _____

ABOUT THE HOTEL

- Hilton Garden Inn, Virginia Beach Ocean Front
3315 Atlantic Ave., Virginia Beach, VA 23451
www.hiltongardeninnvirginiabeach.com
- To get your discounted conference room rate of just \$154 per night, call 757.305.9000 and use conference code VCL. Discounted rate is good for Wednesday through Saturday night.
- Hotel Deadline: September 5
- Stay through the weekend and enjoy the Neptune Festival.
www.neptunefestival.com

