



2017 Strategy Symposium

Agenda

Thursday, October 26

3:00 – 6:00 p.m. – Registration | Harbor's Edge

Pick up your name badge and agenda. Your name badge is your ticket to all conference events, so make sure you pick it up before the fun begins!

6:00 – 7:30 p.m. – Welcome Cocktail Reception | Harbor's Edge

Enjoy a drink and some yummy hors d'oeuvres with some of the region's greatest minds! Attendees and their guests will share an evening with credit union executives, volunteers, speakers, sponsors, and hosts.

7:30 p.m. – Dinner on Your Own

Get out and enjoy all that Portsmouth, New Hampshire has to offer, but don't stay out too late: Your mind will need to be on for the rest of the conference!

Friday, October 27

7:00 a.m. – Registration | Whipple Roberts

Pick up your complete registration bag, filled with the agenda, speaker bios, and all sorts of goodies! If you haven't already, make sure you get your name badge too.

8:00 – 9:00 a.m. – Breakfast | Langdon

Available to all attendees and registered guests.

9:00 a.m. – Symposium Welcome Remarks | Whipple Roberts

Joe Bergeron, President/CEO, Association of Vermont Credit Unions

Jill Nowacki, President/CEO, Credit Union League of Connecticut

9:15 a.m. – The Big Four | Whipple Roberts

Jay Johnson, Callahan & Associates – Symposium Facilitator

Jay Johnson will serve as the facilitator of this two-day event and kick things off with an overview of the highest potential impact trends facing financial services and credit unions in 2018 and beyond.

10:15 a.m. – Leveraging CUs for Consumer Financial Well-Being | Whipple Roberts

Brenton Peck, Sr. Manager, Center for Financial Services Innovation

The financial services ecosystem is changing more rapidly today than ever before. Credit union competition looks nothing like it did yesterday, nor will it look the same tomorrow as it does today. Billions of dollars are being poured into promising FinTech start-ups focused on improving consumer financial health. The majority of consumers are struggling financially, and while many institutions have turned a blind eye those that need them the most, innovators are slowly eating their lunch.

During this session you'll have an opportunity to hear from the Center for Financial Services Innovation (CFSI) about the financial health challenges facing Americans. You'll learn about innovative models, best-practices, and lessons learned in assessing the financial health of credit union members across the country.

11:15 a.m. – Break

11:30 a.m. – Facilitated Dialogue: Session 1 | Whipple Roberts

Jay Johnson, Callahan & Associates – Symposium Facilitator

Jay will return to the podium to lead groups through dialogue and exercises that lead to ideas, actions, and key takeaways to incorporate in your strategic plan.

12:15 – 1:15 p.m. – Lunch | Langdon

1:30 p.m. – Real Life Stories of CU and FinTech Partner Success | Whipple Roberts

Vasilios Roussos, Managing Director, DCU FinTech Innovation Center; David Araujo, Founder and VP of Technology, DCU FinTech Innovation Center; Ted Brown, CEO, Digital Onboarding


The DCU FinTech Innovation Center has become a leader in Boston FinTech, in banking and credit union innovation, and in developing a proof-of-concept pipeline for Digital Federal Credit Union ("DCU"). Center founder and VP of Technology, David Araujo, and Center Managing Director, Vasilios Roussos, will walk through the Center's origin, its scale-up, and how DCU engages with startups. Center Cohort Member, Ted Brown of Digital Onboarding, will provide a startup's perspective on his company's journey at the Center and how DCU helped him refine his product and connect with initial customers. This session will help those thinking about piloting with seed-stage companies, engaging with their local FinTech communities, and considering running a startup accelerator.

2:30 p.m. – Facilitated Dialogue: Session 2 | Whipple Roberts

Jay Johnson, Callahan & Associates – Symposium Facilitator

3:15 p.m. – Day 1 Wrap Up / Evening on Your Own





Saturday, October 28

8:00 – 9:00 a.m. – Breakfast | Langdon

Available to all attendees and registered guests.

9:00 a.m. – Day 2 Kick Off | Whipple Roberts

Jay Johnson, Callahan & Associates – Symposium Facilitator

Jay will set the stage for another great day of learning.

9:15 a.m. – Blockchain and the Future of Payments | Whipple Roberts

James Cunha, Sr. VP Treasury and Financial Services, Federal Reserve Bank of Boston

The world of retail payments is undergoing unprecedented change and the pace is only accelerating. Cryptocurrencies, like Bitcoin, and its underlying technology, blockchain, could disrupt the incumbents in significant ways. Adoption of mobile payments has been slow, but Apply Pay, Samsung Pay and other new entrants are making a dent. The Fed's Faster Payment initiative could add even more innovation and change to the landscape in the coming years. This session will explain all of these developments and how they may affect the payment industry, followed by a discussion about how credit unions should be thinking about them from a strategic planning perspective.

10:15 a.m. – Facilitated Dialogue: Session 3 | Whipple Roberts

Jay Johnson, Callahan & Associates – Symposium Facilitator

11:00 a.m. – Break

11:15 a.m. – Building a Better Board | Whipple Roberts

Peter Callahan, Founder & Leadership Coach, Fresh Perspectives

The Regulators say that qualified volunteers and volunteer succession planning should be one of credit unions' biggest issues in long-term strategic planning, but it can be a challenging topic to address. In this session, we will cover how to create a board that represents the diverse demographics of your membership, and what questions to ask to determine the skill sets that are needed. We will then examine self-governance, how to clarify and maintain expectations, and create accountability. Lastly, we will discuss the interpersonal dynamics within your board, between your board and management team, and discuss how to create sustainable progress and evolution.

12:45 p.m. – Wrap Up, Action Items, and Adjourn

2017 Strategy Symposium

Speaker Bios (in order of appearance)

Jay Johnson, Callahan & Associates – Symposium Facilitator



Jay Johnson is a partner at Callahan & Associates, a respected credit union strategist, and a leading industry voice continuously sought out for his insights. He has more than 22 years of financial industry experience working at top 20 banks and within the credit union industry. Jay's extensive knowledge and approachable style makes him an outstanding presenter and facilitator. His impactful presentations provide real-world examples of successful strategies, tactics, and programs and deliver a new way of thinking about cooperative benchmarking. Jay's thought-provoking presentations deliver fresh ideas for creating greater member value, allowing credit union executives to differentiate themselves and placing an emphasis on collaboration among credit unions. Jay

also serves as president of Callahan Financial Services, a subsidiary of Callahan & Associates dedicated to expanding credit unions' investment alternatives. In this role Jay oversees Callahan's Credit Union Financial Services Limited Partnership (CUFSLP), a multi-owner CUSO that researches credit union business opportunities, and the TRUST for Credit Unions, which supports credit union investments through professionally managed mutual funds. Jay holds a bachelor's degree in business administration degree from Southern Methodist University in Dallas, TX, and an MBA from the Goizueta Business School at Emory University in Atlanta, GA. He is a CFA Charterholder and holds FINRA license series 7, 24, 27 and 63. Jay also currently serves on the NACUSO Board of Directors.

Brenton Peck, Sr. Manager, Center for Financial Services Innovation



Brenton Peck is a Sr. Manager, Business Development at the Center for Financial Services Innovation. Leveraging his previous roles at CFSI as a Consultant and Relationship Manager, Brenton helps organizations structure and execute projects that are designed to improve the financial health of their business and their customers.

Mr. Peck has a strong passion for helping his clients define their financial health strategy, assess the rapidly changing marketplace, and develop high-quality products and practices. He has held positions at the Filene Research Institute, J.P.Morgan Chase, and Wells Fargo.

When not at CFSI, Brenton enjoys hiking, boating, beach volleyball, and 400-level seats at Wrigley Field. He lives in Glen Ellyn with his wife, Bridget, and their daughter, Ashlyn. Brenton graduated from Illinois State University and earned an MBA from the Dunham School of Business at Aurora University.

Vasilios Roussos, Managing Director, DCU FinTech Innovation Center



Vasilios focuses on the nexus point of innovation, partnerships, and entrepreneurship. He is the Managing Director of the DCU FinTech Innovation Center, which is the leading sponsor of FinTech startups in New England. Through the Center, Vasilios is advancing the Boston FinTech ecosystem and the development of seed-stage startups. Previously, Vasilios founded and sold an omnichannel tech company and worked in venture capital, digital product development, and investment research at Village Ventures, Dell EMC, and Cambridge Associates. He graduated with Honors from Brandeis University and has an MBA from Cornell University with a concentration in venture capital and operations.

James Cunha, Sr. VP Treasury and Financial Services, Federal Reserve Bank of Boston



Jim Cunha is Senior Vice President of the Treasury And Financial Services Group. His group's responsibilities include Cash Processing, Payments/Mobile Strategies, and Wholesale Payment Operations. The group is also responsible for two emerging payment businesses for the U.S. Treasury: Stored Value Card (SVC) and Invoice Processing Platform (IPP). SVC is a prepaid smartcard based service used by the Department of Defense for domestic training bases, overseas peace-keeping bases and [soon] the US Navy. IPP helps automate the purchase order and invoice exchange processing for US government agencies and their vendors, and functions as a central repository for vendor payment related information. The Payment Strategies group works with the industry to understand and remove barriers to adoption of mobile payments in the US. Jim is also leading the Bank's applied research into distributed ledger technologies in financial services and studies digital currencies.

Jim has worked at the Federal Reserve Bank since 1984. Prior to that, he worked at Fleet National Bank. He has a BS in Accounting and Philosophy from Northeastern University and a BA in Computer Science from Rhode Island College. He is a member of the Board of Directors of the New England ACH (NEACH) Association and Justice Resource Institute (JRI).



Peter Callahan, Founder & Leadership Coach, Fresh Perspectives



Peter Callahan is a Professional Coach and the Founder of Fresh Perspectives, where they believe that connecting what you are doing with why you are doing it, unleashes human potential. Peter loves to empower leaders, students, and entrepreneurs to discover and act on their values, meaningfully connect with others, and find fulfillment in their work and lives.

Peter holds certifications as a Professional Coach through the Institute of Professional Excellence in Coaching and the International Coach Federation. He has a degree in Entrepreneurship and Business Management, and has managed and worked with Fortune 500 companies and small businesses throughout the country.

Peter serves on the board of the Connecticut Chapter of the ICF, is President of the Litchfield Chapter of Business Networking International, and is a founding board member of the Entrepreneurial Center of Northwest Connecticut. Peter and his wife Mackenzie live in Northwest CT, are avid hikers, skiers, and readers, and love to travel and volunteer throughout their community.

This event is made possible because of the following credit union partners:

