



2017 Annual Conference Overview – Boston, MA

Agenda is subject to change

Monday, July 24, 2017

8 am to 3:30 pm Registration Desk Open

8:30 am to 9:45 am **Delegate Breakfast**

10 am to 3 pm **ROI & Impact Workshop** - This session will feature an in-depth workshop on how to calculate and track the ROI of financial education & youth marketing. We'll hear from a former NCUA examiner, a CFO, and a program manager about why these metrics matter and how attendees can bring them to their own credit unions. We'll also hear about the impact financial education has on brand equity, community health, and member performance. This will be a can't-miss session and an exhilarating conference opener!

From Financial Literacy to Financial Capability: We have a younger generation who claims to be incredibly financially literate, but in fact - this can't be further from the truth. Citing research from Filene Fellow, Annamaire Lusardi, this presentation will detail the journey of the over confident but under capable next generation of financial consumers with a some suggestions on what credit unions can do to try and reach those 'lost in the void'.

4 to 9 pm **Kick-off Reception** – Join us for a Night at the Museum, the America's Credit Union Museum that is as we officially kick-off the 2017 NYIB Conference. Attendees will be transported by bus from the hotel to the museum for a fun-filled night of networking as well as learning about our credit union roots, space is limited so register today! (*Travel time is included in the time listed*)

Tuesday, July 25, 2017

8 am to 5 pm Registration Desk Open

8 to 8:30 am Hot Breakfast

8:30 to 9 am **Welcome – EC & Cooperative Credit Union Association**

9 to 10:30 am **General Session: Millennial Money Chatter James Marshall, manager of the Cooperative Trust and fearless leader of the Crashers.** – **Press** - Based on the latest from Filene's Center of Excellence for Consumer Decision Making, hear about a netnography which revealed how millennials are really talking about money, how they feel about money and what they need. This research comes from Professor Hope Schau and PhD. Student, Ignacio Luri at the University of Arizona.

10:30 to 10:45 am Break

10:45 am to 12 pm **Breakout Session 1**

Policies, Procedures, and Security...Oh My!: A Comprehensive Guide to Student Credit Union Logistics and Legality - **Michael Rathjen, VyStar Credit Union & Andrea Tucker, Marshall Community Credit Union**

Cash handling and account opening procedures are important when running a student branch, but they can be some of the biggest obstacles to overcome. Learn what others in the industry are doing to comply with, and work around, regulations and keep things running smoothly at their schools.

Experiential Learning - Juli Lewis, Southeastern Credit Union Foundation & League of Southeastern Credit Unions and Affiliates

Financial decisions are something we all experience – so why just teach them from a book? Join this session to learn examples of experiential learning techniques and how to make financial concepts real for students. In addition to reality fairs, you'll learn how one League's first annual Financial Fitness Tournament teams were drafted, get details of the kickoff and playoff rounds and how YOUR credit union can take the field for financial education with free resources!

Diversify Your Teaching Portfolio: Personal Finance Resources from the St. Louis Federal Reserve - Scott Wolla, Senior Economic Education Specialist at the Federal Reserve Bank of St. Louis

Are you looking for a new twist on personal finance? The St. Louis Federal Reserve has award winning resources to help you teach solid personal finance content. Learn about the many active learning lessons and online teaching tools available for free from the St. Louis Fed. Featured resources will include No Frills Money Skills, Making Personal Finance Decisions, and Page One Economics.

12 to 1:15 pm

Lunch on your own

1:15 to 1:30 pm

Vendor Introductions

1:30 to 3 pm

General Session: How to Leverage the CU Difference & Financial Literacy in your Marketing Efforts, Gigi Hyland, Executive Director with The National Credit Union Foundation - Press - You won't want to miss this interactive session on how your credit union can grow and thrive through the cooperative principles. Credit unions are unique in the financial services market with their cooperative model, but there are many missed opportunities to leverage the credit union difference to help generate growth and financial success. Many credit unions develop principle-centered initiatives and generate positive economic results for their members, the community and the credit union itself. This also includes your work around financial literacy and community outreach. You'll leave with information on how you can develop a more cooperative purpose-driven credit union to grow and thrive.

3 to 3:15 pm

Snack Break & Visit with Vendors

3:15 to 4:30 pm

Breakout Session 2

CU in College - Engaging Students through Financial Education - Migdalia Gomez, Harvard University Employees Credit Union & Sara Weiser, PSCUE

Post-secondary education can help students prepare to be financially successful, but more often, it just leaves them with a great deal of debt. With financial obligations like student loans, cost of living expenses, and balancing needs vs. wants, college students aren't always aware of just how real things are about to become for them financially. This session will equip CU professionals with best practices to help undergraduates, and graduate students, gain financial knowledge to start them on the road to financial success! Presenters will also discuss how your credit union's products and services can assist student in reaching their financial goals.

Youth Advisory Board - Jennifer Crawford & Michelle Herrera, RBFCU

Learn how to connect youth in your schools and communities with your credit union. Through active youth advisory boards, students can take an ownership by making suggestions and decisions, and feel recognized and valued. You will hear from different Credit Unions on how they've built and run their programs and leave with tools you need to get your own board up and running.

"BIY" Build it Yourself Presentations - Community Financial Credit Union Team

Looking for some fresh ideas for classroom presentations? Learn how to create them yourself! Groups will work together to find new and exciting ways to present relevant financial topics to students at the elementary, middle, and high school levels. Come with an open mind, and leave with a head full of fun presentation ideas!

4:30 to 5:30 pm Vendor Reception

Wednesday, July 26, 2017

8:30 to 10 am Hot Breakfast – Regional Meetings & NYIB FYI

- Western
- Central
- East

10 to 10:30 am Break – Vendor Hall

10:30 to 11:45 **Breakouts Session 3**

CU in College - Engaging Students through Financial Education - Migdalia Gomez, Harvard University Employees Credit Union & Sara Weiser, PSCUE

Post-secondary education can help students prepare to be financially successful, but more often, it just leaves them with a great deal of debt. With financial obligations like student loans, cost of living expenses, and balancing needs vs. wants, college students aren't always aware of just how real things are about to become for them financially. This session will equip CU professionals with best practices to help undergraduates, and graduate students, gain financial knowledge to start them on the road to financial success! Presenters will also discuss how your credit union's products and services can assist student in reaching their financial goals.

Beyond Youth – Forming and Firming Relationships with Teachers & School Districts – Josh Franzen, InTouch Credit Union; Tabatha Thurman, WEOKIE Credit Union & Mandy Clayton, 5Point Credit Union

Financial education is more than just reaching students. It's about forging the right relationships and meeting the needs of the teachers, schools, and districts you work with. This insightful session features tips and simple strategies to grow your program's impact beyond the classroom.

Ask the In-school Experts - Michael Rathjen, VyStar Credit Union & Andrea Tucker, Marshall Community Credit Union

How do you get an in-school branch started? What can you expect from an elementary school branch versus a high school branch? Should you pay your staff? How do you deal with the account opening process? What sort of profitability should you expect? Get answers to all these questions and more by attending our In-School Branch Q & A Panel.

Hear from our team of experts on how their credit unions have created successful in-school branch programs, and what they've learned along the way.

11:45 to 1:15 pm Lunch on your own

1:15 to 2:45 pm **General Session: Financial Literacy & Other Consumer Resources Available from NCUA, Matthew J. Biliouris, Deputy Director with NCUA's Office of Consumer Financial Protection and Access** - Financial literacy is a core credit union mission. While credit unions serve the needs of their members and promote financial literacy within the communities they serve, NCUA works to reinforce credit union efforts, raise consumer awareness and increase access to credit union services. NCUA also participates in national financial literacy initiatives, including the Financial Literacy and Education Commission. In this session you will learn more about NCUA's financial literacy efforts including the financial literacy resources available at no-charge from NCUA and other Federal agencies.

2:45 to 3:15 pm Snack Break & Vendor Door Prizes in Vendor Hall

3:15 to 4:30 pm **Breakouts Session 4**

Lesson Demonstration: Class is in session! – [Trysh Olson, Wings Credit Union](#) & [Ruth Kaneko, BECU](#)

Sit up straight, quit the chatter, and pay attention because class is in session. Attend this breakout and you'll find out exactly what makes students engaged and interested during your next financial literacy lesson. Demo "boxed" and custom presentation resources and learn from the best on how to make your next presentation fun, exciting, and memorable.

Social Media – [Danielle Silva, U.S. Eagle Federal Credit Union](#)

Facebook, Twitter, Instagram, YouTube, Pinterest, SnapChat and more...how is your credit union using social media? Having a strong on-line presence is crucial to credit unions connecting with younger, and older generations alike. If used properly, it can engage, create conversations, loyalty, member involvement, opportunity, and a unique way to provide valuable financial content. This session will introduce you to some of the more popular social platforms, as well as some newer ones, teach you what types of posts are most effective, and what has/hasn't worked for other credit unions.

"BIY" Build it Yourself Presentations - [Community Financial Credit Union Team](#)

Looking for some fresh ideas for classroom presentations? Learn how to create them yourself! Groups will work together to find new and exciting ways to present relevant financial topics to students at the elementary, middle, and high school levels. Come with an open mind, and leave with a head full of fun presentation ideas!

6 to 6:30 pm Annual Meeting – [Wheatley Terrace](#)

6:30 – until Dinner/Awards Banquet/Celebration (Karaoke, dancing & fun) – [Rooftop Ballroom](#)

Thursday, July 27, 2017

8:30 to 9 am Continental Breakfast

9 to 10:30 am **General Session: Best Practices** – Hear from credit unions of all sizes and state leagues on programs that they have found to work (and challenges they have had).

10:30 to 11:45 am

General Session: Creating a Classroom Economy in Elementary & Middle Schools - Debra Lee Surface with St. Jean's Credit Union - [Press](#)

Learn how St. Jean's Credit Union has partnered with Gateway City elementary and middle schools to empower students to begin making powerful financial decisions necessary for them to live fulfilled lives. By piloting the CU4Reality Elementary Education curriculum, St. Jean's has familiarized students with money management through project based learning. Students build a classroom economy in which everyone plays an important role. With the guidance of credit union teachers, students open a class room credit union, student run businesses, pay bills and learn the value of money by earning a salary for coming to class and completing their homework. The culminating event is an auction in which students realize the value of spending, saving and money management through their buying power.

11:45 to 12 pm

Fond farewells!!