



## Credit Union Executive Leadership SYMPOSIUM

Now in its fourth year, the Credit Union Executive Leadership Symposium, hosted by Alloya Corporate FCU and its wholly-owned CUSO, Balance Sheet Solutions, LLC, brought together a record crowd of 185 credit union leaders from 135 credit unions, representing 5.6 million members across 17 states, supporting 15,000 professional credit union jobs.

“Every year we are seeing growth,” said Tim Bruculere, Senior Vice President, Membership. “To see so many credit unions represented from across the country, networking and learning together is powerful. The cooperative spirit is alive and well.”

This year’s symposium featured keynote speaker, Mike Ditka. Years removed from his days as a tough minded head coach of the Chicago Bears, leading his team to victory at Super Bowl XX; and even more time away from his playing days, when he garnered the nickname of “Iron Mike” – Ditka still has the authoritative command and respect from an audience that anxiously waited to hear his experiences on and away from the football field.

“Having goals/ambition is the most important thing. Without that... you have nothing,” said Coach Ditka.

His stories about football, family and business were inspiring – and focused on what he referred to as “A.C.E.” Attitude – “You can’t achieve anything with a bad attitude.” Character – “Not only knowing what is right but doing what is right.” Enthusiasm – “Get excited about your opportunities.”

In addition to Coach Ditka, featured speakers included award winning motivational speaker Sam Glenn; Jay Johnson, Callahan and Associates; Chris Lewis, Primary Financial; Rachel Messick, Visible Equity; Larry Middleman and Mike Smith, CU Business Group; Diane Overgard, 45 Degrees Coaching, Inc.; Steven Rick, CUNA Mutual; Mark Sievwright, Sievwright and Associates. Presenting from Balance Sheet Solutions: Darren Fago, Jim Mathews and Tom Slefinger.

For more details, please visit the symposium’s Daily Wrap-Up feature at [www.alloyacorp.org/symposium2018\\_recap](http://www.alloyacorp.org/symposium2018_recap).

Mark your calendar now! Next year’s symposium will return to Chicago, Illinois at the Westin Chicago River North, September 4-6, 2019.



Alloya’s CEO, Todd Adams; Board Member and former Board Chair, Leanne McGuinness; and newly appointed Board Chair, Floyd Rummel



Alloya’s Senior Vice President of Membership, Tim Bruculere with Coach Mike Ditka



Motivational Speaker, Sam Glenn

### What Members Are Saying About the Symposium...

“From the beneficial sessions, meeting Alloya staff that I’ve interacted with on the phone and the networking with credit union peers – I already feel like I’ve gained more than I thought possible by being here.” – Michele Walczak, Manager, Kaleida Health FCU



“Over 38 years, I can’t say I’ve experienced a better credit union event.” – Jeff Ellingson, CFO, SMW Financial Credit Union

“The symposium was a great value to me. It provided some great speakers, a lot of relevant topics, including CECL, future technology and a good amount of economic discussion. The timing of this conference was great as we move into our strategic planning and budget process, and there was time allowed to network with peers.” – Melvin Tody, CFO, St. Cloud FCU

## Online Trading Just Became Easier Introducing Premier Portfolio

Thanks to a collaborative effort between Alloya Corporate FCU and Volunteer Corporate Credit Union – Alloya has launched a new tool offered through their wholly-owned CUSO, Balance Sheet Solutions, LLC that allows credit unions to **perform investment activities in one location!**

### View and Buy Offerings

Conveniently review available security offerings and place orders right from your desk.



### Access Documents and Reports

Easily access key documents, monthly statements and overall market analyses.

### View Portfolio Holdings

See current investments online and export into a spreadsheet format.

### Quickly View Current Rates

Stay in the know – view daily rates in the same location where purchase decisions are made.

### Read Daily Commentary & Weekly Relative Value

Gain access to educational content that tracks market and economic trends, analyzes key releases and watches ongoing political developments.

For a sneak peek and to learn more, visit [www.alloyacorp.org/premierportfolio](http://www.alloyacorp.org/premierportfolio).

**BALANCE SHEET SOLUTIONS**  
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### Meet Kurt Stevenson, President, Balance Sheet Solutions

Kurt oversees activities for the broker/dealer, investment advisory services and financial products. He has 30 years of experience in leadership and balance sheet optimization in the financial services industry.

## CU Business Group Offers New Fast Track Program

This program provides a quick and cost-effective “Fast Track” solution for small, non-real estate secured loans and is designed for credit unions of all asset sizes. Loan amounts and underwriting parameters are customizable, and loans come with low or no annual monitoring, which helps to keep costs low.



### Advantages of the Fast Track Program:

- Outsourcing smaller business loans allows you to concentrate internal resources on larger loan requests
- Supplement in-house resources with Fast Track quickly and easily
- Fast Track loans can be originated in the branch, extending your lending capabilities
- Fast, next day loan decisions
- If you do not have an MBL program, you can easily get started by offering smaller business loans
- Loans \$50,000 or less do not count under the MBL cap

For more information, please contact your Senior Business Consultant.

## Webinar Calendar

A variety of online education sessions offer learning opportunities for your credit union's financial officers, board members, operations managers and staff. See our list of upcoming webinars at [www.alloyacorp.org/news\\_webinars](http://www.alloyacorp.org/news_webinars).