

# ENRICH | CONNECT | ENGAGE

In its seventh year, Alloya's 2021 Leadership Symposium will bring together credit union leaders from across the corporate's national membership both in Las Vegas and online for a hybrid presentation of this can't-miss event.

## Who Should Attend

If you're a credit union leader, this event is for you. Whether you are a CEO, CFO, COO, manager or anyone with the responsibility of leading a team of credit union people, Alloya's Symposium is the perfect education event.

## Why Attend

We guarantee you'll gain thought-provoking takeaways, leadership inspiration and a yearning to attend this event year after year.

**Join Us in Las Vegas Attend Virtually Register Daymond John, Keynote Sugar Ray Leonard, Keynote Janine Stange, Keynote** [Join Us in Las Vegas](#)

## When & Where?

September 8-10, 2021

Venetian-Palazzo Resort, Hotel and Casino  
3325 S Las Vegas Blvd, Las Vegas, NV 89109

**[www.venetian.com](http://www.venetian.com)**

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## Cost

\$645 - Alloya members/Alloya Investment Services clients

\$745 - Non-members of Alloya/non-clients of Alloya Investment Services Discounts (in-person only):

\$100 off for each additional in-person registrant from your credit union.

\$100 off for each in-person registration if your credit union's asset size is under \$100 million.

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# Agenda

8:30 - 9:30 am	Breakfast
9:30 - 9:45 am	Opening Remarks <b>Tim Bruculere</b> , Alloya Corporate FCU
9:45 - 10:45 am	<b><u>Powershift   A Fireside Chat with Daymond John</u></b> <b>Daymond John</b> , Founder/CEO of FUBU and star of ABC's <i>Shark Tank</i>
10:45 - 11:00 am	Break
11:00 - 11:45 am	<b><u>Piranha Pool</u></b> <b>Daymond John</b> , other Piranhas to be announced
11:45 am - 12:50 pm	Networking Lunch
1:00 - 2:00 pm Breakout Sessions (choose one):	<b><u>Simplifying Complicated Balance Sheet Strategies</u></b> <b>Greg Hill</b> , Alloya Corporate FCU and <b>Bill Paton</b> , Alloya Corporate FCU  <b><u>Real Time Payments: Now What?</u></b> <b>Margie Giles</b> , Alloya Corporate FCU, <b>Jim Schneck</b> , Alloya Corporate FCU and <b>Kurt Stevenson</b> , Alloya Corporate FCU  <b><u>The Post-COVID Economy   A Contrarian's Perspective</u></b> <b>Tom Slefinger</b> , Alloya Investment Services
2:00 - 2:15 pm	Break
2:15 - 3:15 pm	Breakout Sessions Above Repeated (choose one)
3:15 - 5:00 pm	Free Time
5:00 - 6:30 pm	Reception Bouchon Restaurant, Venetian-Palazzo Resort
7:30 - 8:30 am	Breakfast



<b>8:30 - 9:30 am</b>	<b><u>Alloya Annual Meeting</u></b> & Update <b><u>Todd Adams</u></b> , Alloya Corporate FCU
<b>9:30 - 10:30 am</b>	<b><u>Payment Trends in 2021 and Beyond</u></b> <b><u>Naseer Nasim</u></b> , Aptys Solutions
<b>10:30 - 10:45 am</b>	Break
<b>10:45 - 11:45 am</b>	<b><u>The Power to Win!</u></b> <b><u>Sugar Ray Leonard</u></b> , <i>Legendary Boxing Icon, Olympic Gold Medalist, and Hall of Famer</i>
<b>11:45 am - 12:45 pm</b>	Meet & Greet with Sugar Ray Leonard
<b>12:45 - 3:30 pm</b>	Free Time & Lunch on Your Own
<b>3:30 pm</b>	Transportation to Allegiant Stadium
<b>4:00 pm</b>	Football Night with Alloya Allegiant Stadium
<b>7:00 - 9:00 pm</b>	Transportation from Allegiant Stadium (rotating basis every 30 minutes)



<b>7:30 - 8:40 am</b>	Breakfast
<b>8:40 - 9:45 am</b>	<b><u>5 Keys to Maintaining Balance During and After Disruption</u></b> <b><u>Janine Stange</u></b> , <i>Motivational Speaker, Singer and On-Air Personality</i>
<b>9:45 - 10:00 am</b>	Break
<b>10:00 - 11:15 am</b>	<b><u>The Resilience Factor &amp; Team Up!</u></b> <b><u>Sam Glenn</u></b> , Motivational Speaker & <b><u>Eddie Slowikowski</u></b> , Former NCAA All-American Athlete and Gold Medalist
<b>11:15 - 11:30 am</b>	Closing Comments

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## Hotel Reservations – Deadline August 13, 2021

Venetian-Palazzo Resort, Hotel and Casino  
3325 S Las Vegas Blvd, Las Vegas, NV 89109

**[www.venetian.com](http://www.venetian.com)** Check-in: 3:00 pm PT

Check-out: 11:00 am PT

Alloya has reserved a room block with the following discounted room rates for the nights of September 6-10:

- \$209/night for a king-bed suite
- \$229/night for a two-queen-bed suite

To receive the discounted room rate please make reservations by 5:00 pm PT on August 13, 2021, by calling (866) 659-9643. Be sure to mention Alloya or RALFC. Online reservations are also available at **[this link](#)**. The room rates are available +/- three days from the conference dates, based on availability. The two-queen-bed suites are also based on availability.

The daily Resort Fee is \$35 plus applicable tax per night, payable upon check-in. The daily Resort Fee includes: Access for two to the fitness facility at the Canyon Ranch® spa + fitness, in-suite Internet access (Wi-Fi or Ethernet), boarding pass printing at the Concierge desk, unlimited local and toll-free calls, and access to thousands of top magazines and newspapers through the free PressReader app.

Parking: Parking is free. Valet parking and self-parking are provided as a courtesy to all guests of The Venetian and The Palazzo.

The hotel is located approximately 10 minutes from McCarran International Airport (during non-peak driving times).

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## Questions/Comments/Special Needs

Contact **[events@alloyacorp.org](mailto:events@alloyacorp.org)**.

Attend Virtually

# Attend Virtually – When & Where

Join us from the convenience of your office – wherever that may be come September! All you'll need is an internet-connected device and a comfy chair so you can sit back and soak up the great content we have lined up for you.

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## Cost

\$195 – Alloya members/Alloya Investment Services clients

\$245 – Non-members of Alloya/non-clients of Alloya Investment Services

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## Agenda

### Choose your time zone

▼ Eastern Time

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**Alloya Annual Meeting** & Update  
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**11:30 am - 12:30 pm**

**Payment Trends in 2021 and Beyond**  
**Naseer Nasim**, Aptys Solutions

**12:30 - 12:45 pm**

Break

**12:45 - 1:45 pm**

**The Power to Win!**  
**Sugar Ray Leonard**, Legendary Boxing Icon, Olympic Gold Medalist, and Hall of Famer

**10:40 - 11:45 am**

**5 Keys to Maintaining Balance During and After Disruption**  
**Janine Stange**, Motivational Speaker, Singer and On-Air Personality

**11:45 am - 12:00 pm**

Break

**12:00 - 1:15 pm**

**The Resilience Factor & Team Up!**  
**Sam Glenn**, Motivational Speaker & **Eddie Slowikowski**, Former NCAA All-American Athlete and Gold Medalist

**1:15 pm**

Closing Comments

## Questions/Comments/Special Needs

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Register

## Registration

Registration for the 2021 Credit Union Executive Leadership Symposium has closed.

To register for the 2022 Credit Union Executive Leadership Symposium, being held in Chicago, IL from September 7-9, visit our [\*\*event webpage\*\*](#).

Daymond John, Keynote



## Daymond John *Powershift | A Fireside Chat with Daymond John*

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An entrepreneur in every sense of the word, Daymond John has come a long way from taking out a \$100,000 mortgage on his mother's house and moving his operation into the basement. John is CEO and Founder of FUBU, a much-celebrated global lifestyle brand, and a pioneer in the fashion industry with over \$6 billion in product sales. He is an award-winning entrepreneur, and he has received over 35 awards including the Brandweek Marketer of the Year, Advertising Age Marketing 1000 Award for Outstanding Ad Campaign, Ernst & Young's New York Entrepreneur of the Year Award and, most recently, was named #4 on LinkedIn's Top 20 Voices, a list of the top influencers in the U.S. worth following to get inspired and stay informed!

His marketing strategies and ability to build successful brands has made him a highly influential consultant and motivational speaker today. His marketing firm The Shark Group offers advice on how to effectively communicate to consumers through innovative means and connects brands with the world's top celebrities for everything from endorsements to product extensions. John is also an author of four best-selling books including his *New York Times* best-selling books, *The Power of Broke* (2016) and *Rise and Grind* (2018). In March 2020, John released his sixth book, *Powershift*, that walks through his tried-and-true process of how to transform any situation, close any deal and achieve any outcome through his own experience and vast network of industry leaders.

He's celebrating his 12<sup>th</sup> season on ABC's hit business show *Shark Tank* by acclaimed producer Mark Burnett. It has now gone on to win four Emmys and millions of weekly viewers tune into the show as John demonstrates his marketing prowess and entrepreneurial insights.

Sugar Ray Leonard, Keynote

## Sugar Ray Leonard *The Power to Win!*

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Legendary sports icon, Olympic champion and Hall of Famer, philanthropist, bestselling author, television personality, ringside analyst and longtime face of Skechers' popular Relaxed Fit collections, Sugar Ray Leonard has established a legacy that epitomizes boxing and invokes the reverence of a champion. Outside the boxing ring, Leonard's illustrious career also merits admiration as he led the charge to bring the sport of boxing into the cultural limelight where it is today. Leonard also helms the Sugar Ray Leonard Foundation which celebrated its 12th anniversary in May. The Foundation is committed to funding life-changing research for pediatric type 1 and type 2 diabetes, and to helping children build early healthy habits.

Having learned to box at the young age of 14, Leonard's celebrated career includes three National Golden Gloves titles, two Amateur Athletic Union (AAU) championships and the 1975 Pan-American Games crown. After winning a gold medal in boxing at the 1976 Olympic games, he turned professional as a last-ditch effort to help his family defer mounting medical bills incurred from his father's illness. Blinding speed, tremendous power and palpable charm quickly made Leonard a media favorite, dubbed early on by the late Howard Cosell as the "new Muhammad Ali."

At the age of 20 (1977), Leonard won his first professional fight, only setting the stage for a collection of the most memorable fights in all of boxing history. He went on to defeat some of the greatest boxers of the modern era, from Wilfred Benitez to Roberto Duran, Thomas Hearns and Marvelous Marvin Hagler, from whom Leonard won the world middleweight title. During his 20-year professional career, Leonard also won world titles in the welterweight, junior middleweight, super middleweight and light heavyweight divisions - the first boxer to win world titles in five different weight classes.

In 2011, Leonard published his first autobiography (Viking Books) *THE BIG FIGHT: My Life In and Out of the Ring*. In the inspiring autobiography, the boxing legend vulnerably confronts his greatest competitor: himself. Sugar Ray Leonard's raw and uplifting memoir reveals in

intimate detail for the first time the complex human who waged his own personal battle with depression, rage, addiction and greed, that lay behind the champion.

Leonard's charismatic personality and expert ring knowledge led to a successful career as a television broadcaster for NBC, ABC, FOX, HBO, DAZN, and ESPN. He was also featured as the international commentator for the record-breaking Mayweather vs. McGregor fight. Other television credits include three consecutive seasons as host and mentor in the Emmy-nominated *The Contender*, and a fan-favorite contestant on ABC's still reigning competition series, *Dancing with the Stars*.

On the silver screen, Leonard appeared in the critically acclaimed Paramount Pictures film *The Fighter* and was an expert consultant for DreamWorks and Walt Disney Pictures on Hugh Jackman's *Real Steel*.

Perhaps most importantly, some of Leonard's most impactful work is yet to be done. With a deep calling towards and passion for humanity, Leonard has always been devoted to his community and to helping those in need. In establishing The Sugar Ray Leonard Foundation in 2009, Leonard and his wife, Bernadette, took changing the world into their own capable hands. Since its inception a decade ago, the foundation has funded countless research projects and offered life-changing patient care for children living with type 1 and type 2 diabetes. Furthermore, the foundation is also committed to helping children lead healthier lives through diet and exercise, equipping them with the tools to be successful in health later in life. Leonard also lends his time to Habitat for Humanity, serves as co-chair for the Ambassadors of Children's Hospital Los Angeles (CHLA) and remains the international chairman of the Juvenile Diabetes Research Foundation Walk for a Cure.

Leonard has four children and lives in Southern California with his wife, Bernadette.

Janine Stange, Keynote

## Janine Stange

### *5 Keys to Maintaining Balance During and After Disruption*

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Janine Stange is a motivational speaker, singer and on-air personality best known for her historic journey to sing the Star-Spangled Banner in all 50 states - a mission she embarked on to honor our brave soldiers. Her story is the subject of *National Anthem Girl*, a documentary by Kelly's Filmworks now streaming on Amazon Prime.

Using her signature wit and wisdom, Janine Stange motivates people to give back and identify ways to make personal change. Stange has spoken to and performed for groups across the country ranging from Fortune 500 companies to inner-city public schools. She connects to all ages and backgrounds, providing a sense of citizenship, duty and what service-over-self really means. Janine also works closely with non-profits that empower and give back to our military and their families, and is the Founder of **The Medal of Honor Mail Call**, which collects letters, postcards, drawings and paintings from grateful Americans all across the country and distributes them to Medal of Honor recipients as a way to thank our nation's heroes.

Janine has been featured on every major television network and has appeared on national news shows including: *TODAY Show*, *Fox & Friends*, *NBC Nightly News*, and *Fox News @ Night*. She can be heard every Thursday morning on Sirius XM's *60's on 6* with Phlash Phelps.

For Stange, the journey has been as good as any world tour. She has met countless, diverse Americans, military and civilian alike. She has sung in big cities, and experienced small town Americana at its finest.

## Modal Box

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# COVID-19 Safety Measures

Our official **COVID-19 Health & Safety Plan** is now available. Please be sure to review the plan in its entirety prior to the event.

If you have any questions, please contact **events@alloyacorp.org**.

As of August 26, 2021

## Modal Box

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# Tax Exemptions

In order to be tax exempt under the Clark County transient lodging requirements, attendees need to complete Clark County's Transient Lodging Tax Exemption Form for Federal Credit Unions (click [here](#) to access) and provide a proper method of payment (credit union credit card or credit union check) in order for the reservation to be updated to tax exempt upon arrival and check-in. Once the reservation is made with the hotel, please submit the completed tax exemption form to the housing manager, Cristina Buquoy, at [\*\*cristina.buquoy@sands.com\*\*](mailto:cristina.buquoy@sands.com). Attendees must still bring and provide the proper method of payment upon arrival/check-in.

Other methods of payment for lodging costs by room guests such as cash, personal checks, personal credit cards, and wire transfers from personal accounts do NOT qualify as "direct payment" for federal credit unions. Thus, no exemption is allowed.

For non-Federal Credit Union attendees, the credit union will have to provide a letter showing that the state of Nevada has granted tax exemption from sales and use tax. If you are tax exempt in the state of Nevada, please bring that letter and proper method of payment (credit union credit card or credit union check) then the reservation will be updated to tax exempt upon arrival and check-in.

If you are not tax exempt in the state of Nevada, but wish to apply - the link for the application along with more information, can be found at [\*\*https://tax.nv.gov/Forms/Sales\\_\\_Use\\_Tax\\_Forms/\*\*](https://tax.nv.gov/Forms/Sales__Use_Tax_Forms/).

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## Tim Bruculere



As Senior Vice President, Membership, Tim Bruculere is responsible for leading Alloya's member services and relations, marketing, consulting and lending administration ensuring the financial goals; the establishment/retention of member relationships; and the advancement of a positive marketplace image for the corporate.

Previously, Bruculere worked for M&T Bank as Administrative Vice President, leading a team of relationship professionals responsible for all customer management including product sales, implementation, and service. He brings more than 25 years of financial institution experience to Alloya, which includes cash management, capital markets, and corporate, commercial real estate and consumer lending.

Bruculere is past Chair of the University at Albany School of Business Advisory Council, past Secretary and board member of the New York State Trooper Foundation, past Treasurer and board member of the American Red Cross of Northeastern New York, and formerly served on the Investment Committee of Statewide Zone Capital Corp.

Bruculere holds his Bachelor of Science in Accounting from St. John Fisher College, Rochester, NY.

## Modal Box

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## Daymond John



An entrepreneur in every sense of the word, Daymond John has come a long way from taking out a \$100,000 mortgage on his mother’s house and moving his operation into the basement. John is CEO and Founder of FUBU, a much-celebrated global lifestyle brand, and a pioneer in the fashion industry with over \$6 billion in product sales. He is an award-winning entrepreneur, and he has received over 35 awards including the Brandweek Marketer of the Year, Advertising Age Marketing 1000 Award for Outstanding Ad Campaign, Ernst & Young’s New York Entrepreneur of the Year Award and, most recently, was named #4 on LinkedIn’s Top 20 Voices, a list of the top influencers in the U.S. worth following to get inspired and stay informed!

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# Powershift | A Fireside Chat with Daymond John

An entrepreneur in every sense of the word, Daymond John has come a long way from taking out a \$100,000 mortgage on his mother's house and moving his operation into the basement. Daymond is CEO and Founder of FUBU, a celebrated global lifestyle brand, and a pioneer in the fashion industry. His marketing strategies and ability to build successful brands has made him a highly influential consultant and motivational speaker today.

Daymond will kick-off this year's Symposium by joining us for a fireside chat, including a Q&A segment where attendees will have the opportunity to pick the brain of the star of ABC's *Shark Tank*. In addition to being able to draw inspiration from Daymond's story and walk away with new ideas for your credit union, all attendees (virtual and in-person) will receive a complimentary signed copy of his latest book, *Powershift: Transform Any Situation, Close Any Deal, and Achieve Any Outcome!*

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Field of study: Specialized Knowledge

Prerequisites: None

Who should attend: Those who are looking to draw inspiration from a successful entrepreneur's story and generate new ideas for their credit union.

Advance preparation: None

Program level: Basic

Delivery method: Group Internet Based & Group Live

Group Internet Based requirement: In order to be awarded the full credit for this session, you must respond to the polling questions or checkpoints asked during this program.

Participants will earn 1.0 CPE credit.

## Modal Box

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# Greg Hill



As a consultant and part of the Strategic Initiatives Group for Alloya, Greg has worked with the corporate on several key initiatives including architecting and managing the new Loan Participation Platform. Greg is a former credit union CEO and was previously a Board member for Alloya as well. He has an extensive background in lending and operations and currently serves as the Chair for a Commercial and Mortgage lending CUSO.

Greg received his MBA from the University of Kansas and his bachelor's degree in Finance/Economics from the University of Nebraska.

## Modal Box

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# Bill Paton



As the Vice President, Loan Participations & Lending, Bill Paton is responsible for the overall performance of Alloya Corporate's loan portfolio and related liquidity products. Bill oversees the underwriting, origination and closing of all loans, and has a keen focus on member service as well as the present and future health of the corporate's balance sheet as related to its loans.

Bill received his Bachelor of Arts in Economics from Hartwick College (Oneonta, NY).

## Modal Box

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# The Post-COVID Economy | A Contrarian’s Perspective

On the back of unprecedented monetary and fiscal stimulus, we have experienced a V-shaped recovery from the COVID pandemic. While the recovery is welcome news, the bigger story is that all of this is happening on borrowed money from the government.

Massive and unprecedented transitory rounds of stimulus have provided the glue for this recovery, but this is artificial and not long lasting. The “stimulus” is like your boss giving you a bonus one year and then taking it away the next year. In other words, nothing taking place today is permanent; it is all very temporary.

Yet the view of booming growth, inflation and rising yields has become a widespread narrative within the Wall Street community. Some suggest that we will have a redux of the Roaring '20s. However, while mainstream economists posit that the stage is set for lasting robust economic growth, no evidence supports the claim.

In this session, we will discuss why the aforementioned consensus views will quickly collide with the secular dynamics of excess debt, aging demographics and disruptive technologies, which will continue to inhibit economic growth, inflation and interest rates.

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Field of study: Economics

Prerequisites: None

Who should attend: Those who are looking to learn what lies ahead for the U.S. economy in regard to economic growth, inflation and interest rates.

Advance preparation: None

Program level: Intermediate

Delivery method: Group Live

Participants will earn 1.0 CPE credit.

## Modal Box

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# Tom Slefinger



Tom’s primary role is to develop and manage operations associated with Institutional Fixed Income Sales with ISI. In addition to providing strategic direction, Tom is heavily involved in analyzing portfolios, developing investment portfolio strategies and identifying appropriate sectors and securities. The ultimate goal of this activity is to optimize investment portfolio performance at the credit union level. In total, Tom has more than 32 years of combined success in fixed income analysis, trading and portfolio risk management. He has a proven track record of delivering superior investment performance across domestic and international fixed income funds.

Tom holds a B.S. in Business Administration from the University of Maine. In addition, he holds a Series 7 and 63 through ISI.

## Modal Box

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# The Power to Win!

Whether achieving greatness as an athlete or in the business arena, the same qualities that drive success apply: discipline, focus, determination, preparation, the right attitude and setting fear of the unknown aside. Sugar Ray Leonard makes a powerful case for his

principles of success with a sense of humor and a smile that lights up the room.

An enormously charismatic figure, Leonard will share stories of what it took to reach his dream of Olympic gold, of what it took to get to the top in his professional career and stay there, and stories of his journey to make the challenging transition from life as an athlete to that of an entrepreneur. Making your dreams come true, staying at the top and dealing with change are all themes of Leonard's stories - themes that will resonate with credit union leaders.

Sugar Ray Leonard is a masterful speaker and after attending his keynote, you will come away with a renewed enthusiasm and commitment to being the best.

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Field of study: Personal Development

Prerequisites: None

Who should attend: Those who are looking to renew their enthusiasm for what they do and recommit to being the best.

Advance preparation: None

Program level: Basic

Delivery method: Group Internet Based & Group Live

Group Internet Based requirement: In order to be awarded the full credit for this session, you must respond to the polling questions or checkpoints asked during this program.

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# Sugar Ray Leonard

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# Payments Trends in 2021 and Beyond

The pandemic has forever changed the payments ecosystem. We have never experienced a time quite like the past two years personally and professionally, and the same can be said for the payments business. Credit unions are scrambling to respond as the scale of disruption and tempo of change have grown exponentially. Consider the following trends behind this dramatic shift:

- 45% of shoppers have shifted to digital channels.
  - 79% plan to continue shopping digitally.
- 82% of small businesses digitally transformed their operations.
  - 43% are selling products online.
  - 30% are digitizing backend payments operations.

Some of these trends are a result of the pandemic and some have been emerging for years but were accelerated by it. As consumers and businesses seek fast, convenient and secure ways to send and receive funds, credit unions must strike a balance between "do it yourself"

and “do it all by yourself.”

In this thought-provoking presentation, Naseer Nasim will help you navigate the trends in the payments ecosystem, discover how to adapt and respond to the digital shift, and strengthen your trusted relationship with your members in this new digital era.

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Field of study: Specialized Knowledge

Prerequisites: None

Who should attend: Those who are looking to discover how to adapt and respond to shifts in the digital payments landscape.

Advance preparation: None

Program level: Basic

Delivery method: Group Internet Based & Group Live

Group Internet Based requirement: In order to be awarded the full credit for this session, you must respond to the polling questions or checkpoints asked during this program.

Participants will earn 1.0 CPE credit.

## Modal Box

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# Naseer Nasim



For almost 30 years, Naseer Nasim has been a student and practitioner of transformational leadership. Naseer believes that the only way to drive profitable and sustainable growth is through the relentless pursuit of excellence in culture, people and process.

Recognized as one of the leading technology executives in the financial software and solutions industry, Naseer's senior executive experience spans from a multi-national, publicly traded organization to privately held, CUSO and startup companies. Throughout his career, he has achieved record financial results, increased market share, increased customer satisfaction and Net Promoter Score, improved and expanded VAR/OEM relationships, and increased productivity and employee engagement.

Naseer was named President and CEO of Aptys Solutions in March 2021. Aptys is one of the leading providers of cloud-based, unified electronic payments technology serving over 4,800 financial institutions through enterprise software, faster payments and mobile person-to-person (P2P) solutions. Aptys helps financial institutions offer differentiating payment products that increase efficiencies, reduce friction, manage compliance and reduce risk. Prior to Aptys, Naseer served as CEO and board member of QRails - a Fintech payments solutions provider in North America and Western Europe, offering the latest in payment issuer processing and program management. As CEO and board member of Bakerhill, Naseer successfully carved out Bakerhill from Experian and created one of the largest small business lending and smart data analytics companies in North America. Prior to Bakerhill, Naseer was Account Processing President of Fiserv, responsible for six products including XP2, Spectrum/Summit, Acumen, CUBE, Advantage/AFTech and COUL. Naseer has won numerous awards and recognition both for business turn around and for successful, profitable growth.

Naseer is passionate about helping clients succeed. In his new role, Naseer will consult with Aptys stakeholders to provide advanced, end-to-end payment solutions leveraging cloud computing, data analytics and machine learning to drive more profitable relationships. Naseer is a leading expert in the areas of financial software development, payments, strategic planning, risk analysis, and creating sustainable and profitable growth. He is a top-tier speaker at financial services industry conferences.

Naseer graduated cum laude with a Master of Business Administration from University of

Phoenix. He also holds a Bachelor of Science in Computer Science from University of Kansas. He holds numerous certifications in leadership, finance, banking, management, sales/business development, business and technology.

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# 5 Keys to Maintaining Balance During and After Disruption

As the Greek philosopher Heraclitus said, “Change is the only constant.” If only Heraclitus could take a look around today!

In this session, Janine will deliver a powerful, clear and concise talk with an interactive component at the conclusion designed to help you not only spark resilience, but maintain a path of positive growth during disruptive change. This session will leave you inspired to move in spite of fear and empower you to do “what you can, with what you have, right where you are” in both your personal and professional life.

- If you compromise your values, you will ultimately lose.
- If you’ve got time to “lean” you’ve got time to “clean.”
- Never let ‘em see you sweat.
- Check your blind spots.
- Don’t just say you care; show you care.

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Field of study: Personal Development

Prerequisites: None

Who should attend: Those who are looking to learn how to move in spite of fear and become empowered to do the best they can in both their personal and professional life.

Advance preparation: None

Program level: Basic

Delivery method: Group Internet Based & Group Live

Group Internet Based requirement: In order to be awarded the full credit for this session, you must respond to the polling questions or checkpoints asked during this program.

Participants will earn 1.0 CPE credit.

## Modal Box

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# Janine Stange

Janine Stange is a motivational speaker, singer and on-air personality best known for her historic journey to sing the Star-Spangled Banner in all 50 states – a mission she embarked on to honor our brave soldiers. Her story is the subject of *National Anthem Girl*, a documentary by Kelly’s Filmworks now streaming on Amazon Prime.

Using her signature wit and wisdom, Janine Stange motivates people to give back and identify ways to make personal change. Stange has spoken to and performed for groups across the country ranging from Fortune 500 companies to inner-city public schools. She connects to all ages and backgrounds, providing a sense of citizenship, duty and what service-over-self really means. Janine also works closely with non-profits that empower and give back to our military and their families, and is the Founder of **The Medal of Honor Mail Call**, which collects letters, postcards, drawings and paintings from grateful Americans all across the country and distributes them to Medal of Honor recipients as a way to thank our nation’s heroes.

Janine has been featured on every major television network and has appeared on national news shows including: *TODAY Show*, *Fox & Friends*, *NBC Nightly News*, and *Fox News @ Night*. She can be heard every Thursday morning on Sirius XM’s *60’s on 6* with Phlash Phelps.

For Stange, the journey has been as good as any world tour. She has met countless, diverse Americans, military and civilian alike. She has sung in big cities, and experienced small town Americana at its finest.

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# The Resilience Factor

Picture this: You are preparing to climb a mountain with your team – and it’s sure to be a challenging climb. On this expedition, you expect setbacks, uncertainty and stress. So, the question is, what mental and emotional tools do you pack to keep everyone on your team encouraged, focused and resilient?

In this session, Sam Glenn will highlight the key components of resilience that will empower, encourage and equip you and your team for a successful (metaphorical) mountain climbing adventure. Giving up is not an option. Working together, working smarter and working better is how we achieve new peaks of personal and professional success.

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Field of study: Personal Development

Prerequisites: None

Who should attend: Those who are looking to learn new or better ways to work as a team.

Advance preparation: None

Program level: Basic

Delivery method: Group Internet Based & Group Live

Group Internet Based requirement: In order to be awarded the full credit for this session, you must respond to the polling questions or checkpoints asked during this program.

Participants will earn 1.5 CPE credits.

## Modal Box

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# Sam Glenn



For nearly three decades, Sam Glenn’s inspirational and artistic speeches have impacted audiences of all sizes – some audiences as large as 75,000 people at stadium events. Sam has spoken for just about every industry you can imagine. When it comes to attitude, nobody is excluded. Organizations get better when their people get better, and it all starts with attitude. Attitude is the driver of everything, and Sam knows exactly how to recharge and rekindle that positive spark that empowers leaders to give, do and be their best.

Things weren’t always so picture-perfect for Sam. At one time he was homeless, depressed, defeated and negative. It was a chance encounter at a buffet, where Sam accidentally knocked over the legendary Zig Ziglar, that led to a positive friendship between the two and, with Zig’s encouragement, Sam got his life pointed in a better direction.

Today, Sam Glenn is one of the most recognized and trusted keynote motivational speakers in the speaking industry. He is most notably sought after for his captivating kick off and wrap-up general session speeches. Sam’s award-winning speeches set a positive and energetic tone that gets audiences engaged and ready to learn, grow and have fun. Audiences gravitate to his humor, relate to his stories and embrace his relevant ideas for improving their personal and professional life.

Sam Glenn has been named Speaker of the Year on several occasions by meeting and event organizations, and has won two national awards for his training videos. He is the author of more than 30 books based on his research. Hundreds of organizations use Sam’s videos weekly to kick off their staff meetings and cultivate positivity in the workplace. Sam’s most rewarding title in life is being called dad by his three kids and husband by his super awesome wife. Originally from Minnesota, Sam and his family currently reside in Indianapolis, IN.

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# Team Up!

It is easy to want to give up when things get tough. So, what keeps us moving forward in a positive direction when we feel burned out, anxious and stressed out?

Join Eddie in this high-energy, interactive presentation as he illustrates the power of “Connection, Collaboration & Innovation.” Eddie will demonstrate how one person’s positive actions can have a ripple effect on a community of people when the right strategies are developed with company values in mind.

- How do we achieve GREATNESS in our lives and inspire others around us to pursue the same vision?
- How do we PERFORM at our highest levels? How far can we really go?
- How can we OVERCOME what seem to be insurmountable obstacles?

To unearth the answers to these questions, Eddie will share the Four Minute Formula. When you hear Eddie’s story, you will realize how impactful the Four Minute Formula is to both your personal and professional success.

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Field of study: Personal Development

Prerequisites: None

Who should attend: Those who are looking to learn new or better ways to work as a team.

Advance preparation: None

Program level: Basic

Delivery method: Group Internet Based & Group Live

Group Internet Based requirement: In order to be awarded the full credit for this session, you must respond to the polling questions or checkpoints asked during this program.

Participants will earn 1.5 CPE credits.

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# Eddie Slowikowski



Eddie is a former world-class runner and gold medal winner for the USA Track & Field Team. He was three-time Division I NCAA All-American and National cross-country champion out of Loyola University in Chicago. Formerly a reporter in training at CNN before launching his own business, today, Eddie is a highly sought-after speaker, consultant and author.

Eddie is known throughout the industry as a “Peak Performance” Expert! His widely acclaimed Four Minute Formula has been utilized by people from all walks of life. Through years of training as an athlete and running his own successful speaking and consulting business, he knows what it takes to be elite. Eddie has always had the can-do spirit of an entrepreneur, in all walks of life. Best of all, Eddie can channel that sense of accomplishment through interactive storytelling and raw emotion to audiences everywhere. He can make you laugh, cry, dance and learn... all in one presentation. It’s a rollercoaster journey like no other, and Eddie’s been doing it for close to three decades.

Throughout all his many accomplishments, Eddie sought to enrich his life through service. He has volunteered extensively throughout Central America on month-long service trips, spent four years as a tutor for students from the Cabrini Green projects within the inner city of Chicago and has worked tirelessly for the homeless. Eddie widened his worldview beyond the life of sports and now, as a husband and father of four, he proves that a successful balance of life and business can be attained.

Eddie speaks to tens of thousands of people year in and year out, utilizing a vast array of programs that are always customized to fit the needs of each audience. Whether it’s for Fortune 500 companies, associations, healthcare professionals, professional athletes and teams, law enforcement or educational institutions all across the country, Eddie’s personally-devised programs are ever changing, keeping his message on the cutting edge for audiences everywhere. His extraordinary rate of repeat business is a testament to his versatile talent. The one constant through it all remains his high-energy message and interactive style. Eddie uses music, sound effects, dancing and audience interaction to bring his memorable presentations to life.

One thing is for sure: with Eddie Slowikowski, you'll learn how to energize your performance to get the very best out of your ability! His presentations are described as "an experience," so contact Eddie for an "experience" like none other!

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# Simplifying Complicated Balance Sheet Strategies

In an economy where markets are volatile and margins are tight, innovative balance sheet strategies are essential – not optional. Some credit unions have turned to Secondary Capital (Subordinated Debt) to strengthen their balance sheet and net worth while providing the flexibility to grow and attain strategic goals. Some credit unions have relied on Loan Participations to help balance their portfolio through the purchase and sale of loan pools. Some credit unions have considered one or both of these strategies, but hesitated to deploy them due to their complexities and associated costs.

Join Alloya's strategy and lending experts for an interactive session that will break down the intricacies of Secondary Capital (Subordinated Debt) and Loan Participations, clarify how these strategies are designed to address a variety of credit unions' unique balance sheet needs, and leave attendees with actionable tactics to deploy one or both strategies at their credit union. Insight, entertainment and a few fun surprises are guaranteed!

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Field of study: Specialized Knowledge

Prerequisites: None

Who should attend: Those who are looking to learn how Subordinated Debt and Loan Participations can address their credit union's balance sheet needs.

Advance preparation: None

Program level: Basic

Delivery method: Group Live

Participants will earn 1.0 CPE credit.

## Modal Box

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## Piranha Pool

At the conclusion of his keynote session, Daymond John, star of ABC’s Shark Tank, will join a panel of credit union leaders for a live event that we’re calling “Piranha Pool.” In the Piranha Pool, two pre-selected credit unions will pitch their ideas to Daymond and the panelists (aka “piranhas”). The piranhas will discuss and evaluate each idea, and eventually decide on one pitch that outdoes the others. The credit union with the top-ranking pitch will receive \$10,000 from Alloya to help their idea take flight. The runner-up will receive \$5,000.

The pitch application deadline to submit your credit union’s idea to Alloya has passed. Join us at the Symposium (in-person or virtually) to experience this exciting session!

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## Real-Time Payments: Now What?

The pandemic helped consumers overcome their discomfort with a digital and contactless world. As a result, consumers now expect the same fast-paced conveniences – such as real-time payments – from their financial institution. According to a 2020 collaborative study by PYMNTS and Alacriti, 30% of consumers believe that access to real-time payments is a key factor when selecting a financial institution.

The good news is that real-time payments are already here! The potentially nerve-wracking news is that the pressure is mounting for credit unions to join the real-time movement. The Clearing House launched its RTPâ Network in 2017, and the Federal Reserve is preparing to launch its FedNow<sup>SM</sup> Service 2023. Will your organization be getting in the real-time game?

Before you hit the ground running, there are a few important questions to ask...

- What really matters to consumers like you and me?
- What about businesses and merchants?
- What really matters to credit unions?

Join the discussion to gain insights on developing a roadmap to navigate the evolving payments landscape and *focus your efforts where they matter most*.

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Field of study: Specialized Knowledge

Prerequisites: None

Who should attend: Those to gain insights on developing a roadmap to navigate the evolving payments landscape.

Advance preparation: None

Program level: Basic

Delivery method: Group Live

Participants will earn 1.0 CPE credit.

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## Magie Giles

As the Senior Vice President of Operations, Margie Giles supports the payment operations that deliver products to credit unions along with compliance, fraud prevention and member product support. Her responsibilities include supporting the delivery systems for wires, ACH, check processing and international payments through compliance with all applicable regulations, as well as supporting the implementation process of these key member services. Giles oversees the organization’s product operations, ensuring that the corporate’s financial objectives and goals are met.

With nearly 30 years in business management and information technology, Giles has a vast

array of experience at the corporate as well as other leading companies. Previously, she has held leadership roles in strategic initiatives, technology, information security, business continuity, compliance, payment operations and project management. During her tenure at the corporate, she successfully led numerous corporate merger and system integration projects that resulted in significant operational efficiencies. Most recently, she served as the corporate's Senior Vice President of Strategic Initiatives.

Prior to joining Alloya in 2003, Giles served as an Information Technology Consultant and Project Manager at Accenture (formerly Andersen Consulting), Hewitt Associates (now AON) and GVG Technology, Inc.

Giles holds her Bachelor of Science degree in Computer Science (with a minor in Business) from Northern Illinois University. She is currently a board member of her homeowner's association.

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## Jim Schneck

As the Chief Strategy and Innovation Officer, Jim Schneck leads the strategic planning process, which ensures that organizational objectives and initiatives are directed towards increasing value to the membership of Alloya Corporate.

He is also responsible for Alloya's payments business growth and innovation efforts. In this role, he assesses changing technology and industry dynamics to determine the most advantageous growth pathways: acquisitions, partnerships, product builds and/or strategic investments.

Schneck applies a unique blend of perspectives, having served clients in such financial and consulting firms as McKinsey & Company and Houlihan Lokey, led strategy and corporate development for a 5,000+ employee organization, and founded smaller advisory firms. He has been a contributor in the development of broadly used strategy and innovation methodologies such as The Balanced Scorecard and Experience Co-Creation.

Prior to Alloya, he served as Managing Partner for the Convergent Strategy Group.

Schneck holds his Master of Business Administration from the Kellogg School of Management at Northwestern University, and his Bachelor of Science in Electrical Engineering from Iowa State University.

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## Kurt Stevenson

As Senior Vice President of Payments, Kurt Stevenson oversees the corporate’s payment strategy and operations, compliance and member product support. Separately, Stevenson also serves as the President of Alloya Solutions, LLC (Alloya Corporate FCU’s wholly owned CUSO). In this role, he oversees activities for the broker/dealer services and financial products offered through the CUSO. He has over 30 years of experience in executive leadership; and balance sheet and earnings optimization in the financial services industry.

Previously, Stevenson served as President and Chief Executive Officer for Centru Financial Corporation, a publicly traded bank holding company, and its wholly owned subsidiary Centru Bank (Ottawa, IL). Throughout his three-decades with Centru, Stevenson rose up through the ranks by progressing through various operational and financial roles before being named President and CEO in 2011. During his tenure as CEO, he implemented and executed the overall direction, administration and financial performance of the company. He led the team that created significant market valuation appreciation through improvements in the balance sheet by strengthening and simplifying the capital structure, reducing nonperforming assets, organic growth and improving core earnings.

Stevenson holds his Bachelor of Arts in Business Administration from Lewis University in Romeoville, Illinois; and his Master of Business Administration from Keller Graduate School of Management.

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# Todd Adams

Since December 2013, Todd Adams has served as the Chief Executive Officer of Alloya Corporate FCU and has over 25 years of financial services experience. Adams leads the nation's largest corporate credit union whose mission is to support credit union success.

With a strategic focus on advancing people/culture, member service, financial performance and compliance, Adams leads a team of skilled professionals, committed to supporting the success of credit unions across the country. Alloya provides dependable cash management services, an affordable advised line of credit and efficient single point access to a comprehensive set of payment services all delivered through its best in class Premier View technology and supported by high touch member service.

Adams also serves on the board of directors of Primary Financial, LLC, an efficient provider of brokered certificates of deposit; TranzCapture, LLC, the leading provider of check services; Aptys Solutions, LLC, a fintech organization focused on supporting efficient payment processes; CU Business Group, a CUSO providing business lending, deposit and consulting services to credit unions; and CU Investment Solutions (ISI), LLC, a registered broker/dealer. Through collaborative efforts, the CUSOS are designed to provide credit union members with access to capabilities through organizations that are owned by the credit union movement and aligned with the credit union mission.

Adams holds his Bachelor's in Business Administration/Accounting from the University of Iowa.