



## Credit Union Executive Leadership SYMPOSIUM

Introducing This Year's Keynote Speaker...

Join us September 4-6, 2019 at the Westin River North, Chicago IL!



The Alloya Events Team has been busy working behind the scenes to secure top-flight presenters for the fifth annual Credit Union Executive Leadership Symposium. This year's agenda is packed with education, credit union insight and leadership topics that will be presented by some of the brightest industry experts – including this year's keynote speaker, **Suze Orman!**

### Meet Suze...

“When you undervalue what you do, the world undervalues who you are,” said Suze in a recent conversation... and clearly, she has proven that valuing yourself is the first step to achieving the success you are looking for.

Suze grew up on the South Side of Chicago, worked her way through college earning a bachelor's degree in social work at the University of Illinois, and at the age of 30 was still a waitress making \$400 a month. She aspired to open her own restaurant – which prompted her to ask several financial questions, including: “What is a money market account?” Her desire to learn more and become her own advocate lead Suze to land a job as a stockbroker for Merrill Lynch.

Today, in addition to her podcast, Suze appears in her own financial freedom hour first on QVC then on HSN for over 23 years. She was the contributing editor to “O” The Oprah Magazine for 16 years, and hosted the award-winning Suze Orman Show, which aired every Saturday night on CNBC for 13 years.

Orman's television career is distinguished with ground-breaking accomplishments. She remains the single most successful fundraiser in the history of Public Television, and has received an unprecedented eight Gracie awards, which recognize the nation's best radio, television and cable programming for, by and about women. She is also the recipient of the Gracie Allen Tribute Award from the American Women in Radio and Television (AWRT), recognizing her impact in laying the foundation for future generations of women in the media.

Other accolades for Orman's groundbreaking work include the Touchstone Award from Women in Cable Telecommunications, being named one of “The World's 100 Most Powerful Women” by Forbes magazine and twice being named to the Time 100, which names the hundred most influential people in the world.

### What can you expect from Suze's keynote presentation?

Suze will bring her unique brand of storytelling, financial insights and what it means to be a leader. She will explore, among many other topics, according to her, “why is it, out of the tens of thousands, if not hundreds of thousands of questions that I've gotten, nobody has ever written in and asked me one question about a credit union. Why is that? That is a question that needs to be asked and answered – which we will do in September!”

### Register for the Symposium Today!

Take advantage of early bird savings until July 12. Registration details, agenda, scholarship opportunities and more at [www.alloyacorp.org/symposium2019](http://www.alloyacorp.org/symposium2019).

Register by April 30, 2019, and be entered for a chance to win a free symposium registration with hotel accommodations included – a value of more than \$1,500!

EARLY BIRD  
DISCOUNT





## ALM for Board Members – A Special Late-Day Connection Webinar – Thursday, March 21, 2019 at 6:00 pm ET

**BALANCE SHEET SOLUTIONS**  
an alloya company

Having a solid knowledge base for all your available products, services, assets and cash flows, and anticipating the needs of your membership can be daunting as a full-time credit union employee. Now, consider retaining all that information as a credit union volunteer.

Credit union board members serve an important role in operations and long-term planning – steering the credit union towards a bright, sustainable future, while advancing its mission. That’s a lot to take on – and with a mixed background of skills, your board of directors may not be too familiar with important balance sheet tools that may help them in their decision making process. **One such tool is asset/liability management (ALM).**

### What Your Board of Directors Can Expect

Please encourage your board of directors to register for this important training. During this webinar, we will help define and discuss the importance of ALM for directors and how it can help prepare for various risks brought on by a change in the interest rate environment. Plus, we will introduce a four-part ALM Training for Board Members Series that will be made available online – at no charge – for them to watch and re-watch at their convenience after the webinar.

Learn More: [www.balancesheetsolutions.org/learn\\_alm\\_032119](http://www.balancesheetsolutions.org/learn_alm_032119)

## Balancing Your Credit Union's Portfolio is Simple with Alloya's Loan Participation Program



Open to all credit unions, Alloya’s Loan Participation Program is designed to serve as a centralized loan exchange. Alloya manages the entire process, greatly reducing the time, effort and expense your credit union would spend navigating the multi-step process on your own. Alloya provides full financial transparency to both buyers and sellers, unlike traditional, non-credit union brokers.

Sellers	Buyers
Leverage Alloya’s team of Loan Participation experts to help you sell a loan pool! From pricing the pool to finding buyers, Alloya is here to simplify the process for your credit union.	Sign up to receive early notification of newly available loan pools and view all of Alloya’s current offerings at any time. Visit <a href="http://www.alloyacorp.org/loanparticipations">www.alloyacorp.org/loanparticipations</a> .

### Learn More

In a recent Connection Webinar, Bill Paton, Assistant Vice President of Lending and Participations at Alloya Corporate FCU, and Kris Muller, Senior Portfolio Manager at Balance Sheet Solutions, discussed the balance sheet benefits of loan participations. Topics included:

- Recent credit union lending trends – and what they mean for you
- Factors to consider when buying/selling loans
- Peer experiences and loan participation success stories

Contact our Experts!



[LoanParticipations@alloyacorp.org](mailto:LoanParticipations@alloyacorp.org)

Weren’t able to attend? The webinar recording and presentation slides are available online. Visit [www.balancesheetsolutions.org/learn\\_webinars](http://www.balancesheetsolutions.org/learn_webinars) to gain access.