

SOUTHEAST LEADERSHIP DEVELOPMENT CONFERENCE

NOVEMBER 17-19, 2021
THE GRAND HOTEL GOLF RESORT & SPA
POINT CLEAR, AL

Wednesday, November 17

6:30 AM - 8:00 AM

Southeast Credit Union Foundation (SECUF) Charity Golf Tournament Registration

7:00 AM - 8:00 AM

Southeast Credit Union Foundation (SECUF) Charity Golf Tournament Breakfast

8:00 AM - 12:00 PM

Southeast Credit Union Foundation (SECUF) Charity Golf Tournament/Shot Gun Start

9:00 AM - 5:30 PM

Welcome Center/Registration Open

Lunch on Your Own

1:00 PM - 2:00 PM



Breakout Session

Compliance Hot Topics Discussion with LSCU

Bill Berg, MBA, CCUE, CUCE, BSACS, CUERME, David Pace, CCUE, Tony Roberts, CCUE, LSCU
Join compliance experts with LSCU in a discussion of compliance hot topics including Economic Outlook for credit unions in AL, FL and GA, Real Estate Issues and other topics of concern. Also, find out how the LSCU Compliance Consultant Program can help reduce your compliance burden.

1:00 PM - 2:00 PM



Breakout Session

Solve Your Deposit Dilemma & Boost Your Employee Benefits at the Same Time

Fred Palmer, Executive Benefits Specialist, CUNA Mutual Group

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MUTUAL
GROUP**

Explore how alternative funds can be a win-win for your organization and executives.

Credit unions are increasingly investing in non-703 and 704 instruments for clear reasons. Learn how your credit union can strategically fund its benefit obligations through options including Business-owned life insurance, annuities, and even stocks and bonds. You'll see how to manage the additional risk to potentially increase your return on assets. This overview includes the steps you need to take to create a well-documented, compliant program that fits within your credit union's risk tolerance parameters.

1:00 PM - 2:00 PM



Breakout Session

Converting Strategy to Execution

Ray K. Ragan, M.Adm (PM), CS&R, PMP, Chief Strategy Officer, We Florida Financial

This presentation will cover key areas to help you achieve your strategic goals including what strategy really is and where mission and vision fit, the common strategic pitfalls, understanding uncertainty and its role in your strategic planning, lessons from 300 years of military science, lessons from modern decision theory and probability, understanding the Classic Strategic and Value-based Strategic models, the secret layer missing from nearly every strategic plan, building in accountability through execution, strategic communication for effect, how to know if you're succeeding or failing and how to build on strategic success.

1:00 PM - 4:30 PM

Exhibit Set-Up

2:00 PM - 2:30 PM

Break

Wednesday, November 17 (continued)

2:30 PM - 3:30 PM



Breakout Session

Optimize Your Performance as a Board

Laura Lee Vann, Senior Director, Shared Branching, Shared Cooperative Services

Learn more about yourself and how you can work more effectively with your fellow Board members in this interactive session. We'll introduce tools such as Board self-assessments, personality tests, finding your strengths and Enneagrams that can enhance your leadership skills and improve teamwork.

2:30 PM - 3:30 PM



Breakout Session

Cryptocurrency: DeFi and the Future of Finance

David Pace, Manager of Regulatory Advocacy, LSCU

This presentation will cover the basics of cryptocurrency. What it is, how it functions, and how it could impact credit union operations. It will also go over some of the laws that we are seeing states implement to regulate this industry.

2:30 PM - 3:30 PM



Breakout Session

Building Sustainable Customer and Employee Loyalty

JoAnna Brandi, Author and Chief Happiness Officer, JoAnna Brandi & Company, Inc.

Loyal Customers and loyal Employees drive more money to your bottom line. Loyalty changes economics. While it might seem that Customer (and Employee) Loyalty are a moving target -there are some solid strategies you can apply once you understand what drives loyalty and how to harness it. JoAnna Brandi will reveal where loyalty comes from (hint: it's an emotional connection) and how to deliberately create an environment where it grows more readily. In this fast-paced session, you will learn the drivers of loyalty, the essential elements of building loyalty, 7 specific emotional "levers" for loyalty, and the 21 "essential questions" you need to take back to the office and share.

3:30 PM - 3:45 PM

Break

3:45 PM - 4:45 PM



Breakout Session

BSA for Directors

Alisha Stair, CUCE, CCUF, CUDE, BSACS, CCUFC, Member Engagement Consultant, LSCU

Join Alisha Stair, Member Engagement Consultant with the League of Southeastern Credit Unions, for Bank Secrecy Act/Anti-Money Laundering Training. This one-hour session will cover framework of the BSA, procedures for monitoring BSA compliance, reporting requirements, and takeaways from FinCEN enforcement actions. By attending this session, directors will satisfy the annual BSA training requirement set forth by the NCUA.

3:45 PM - 4:45 PM



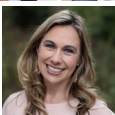
General Session

Regulator Roundtable

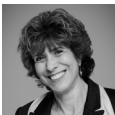
Ben F. Brinkley III, Chief, Bureau of Credit Union Regulation, Florida Office of Financial Regulation

H. Greg McClellan, Administrator, Alabama Credit Union Administration

Melissa Sneed, Deputy Commissioner for Supervision, Georgia Department of Banking and Finance
TBA



3:45 PM - 4:45 PM



Breakout Session

Happiness in the Workplace

JoAnna Brandi, Author and Chief Happiness Officer, JoAnna Brandi & Company, Inc.

Happy workplace cultures are 31% more productive, their sales are 37% higher, there is 125% less burnout and they are 3 - 10 times more creative! Happiness is now widely recognized as a KPI and can be measured! If you want to succeed widely in the future than you MUST develop happiness as a core competency. Fortunately the tools from the evidence based Science of Happiness will make it easy! In this session you will learn the formula for "Positive Deviance", the High Performance Ratio that drives innovation, the 4 strategies for the positive leadership that will drive more happiness, the "master lever" for performance and a feedback tool you'll use daily to build the happiness muscle at work.

5:00 PM - 6:30 PM

Exhibit Hall Grand Opening Reception

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GROUP**

Dinner on Your Own

Thursday, November 18

7:30 AM - 3:00 PM

Welcome Center/Registration Open

7:30 AM - 8:30 AM

Breakfast

8:30 AM - 9:00 AM



Opening General Session

LSCU & Affiliates Update

Patrick La Pine, LSCU & Affiliates, CEO

LSCU & Affiliates Patrick La Pine will give an update on 2021 organizational priorities as well as discuss plans for the upcoming year.



Opening Keynote

Lead Across & Leverage Generational Difference to Optimize Team Performance

Raven Solomon, Author, Strategist, Global Diversity, Equity, and Inclusion Thought Leader

Raven will take us on an in-depth journey to fully understanding not just the generational differences that exist amidst your team, but why these differences exist and how they can be leveraged to create cross-generational synergy that drives results. You will leave with a clear understanding of how generations form and why they have such an impact on the way people perform and how they are best led (and motivated) at work. Raven will share her trademarked framework, Led Languages™, to help attendees develop strategies for effectively leading across the various generations within their team. And she will examine how challenging times, like the current pandemic, impacts the generations on your team.

10:00 AM - 10:30 AM

Break

10:30 AM - 11:30 AM

CEO Roundtable (All Asset Sizes) Sponsored by 

10:30 AM - 11:30 AM

Directors Roundtable

10:30 AM - 11:30 AM



Breakout Session

Drama Free Teams

Dennis McIntee, CEO, Leadership Development Group

Leading a high-trust, high performance team that gets results is possible. It is also possible to do it without putting in more hours and working harder. Creating an ownership culture free of drama, victim mentalities and blame assigning helps leaders leverage their most valuable asset- their team members. Dennis offers this engaging presentation to discover trust-building skills to create team buy-in, understand how to remove emotion from situations, develop skills for giving effective feedback that won't leave employees feeling defensive and learn coaching questions guaranteed to create ownership with your team and one question to never ask.

12:00 PM - 1:15 PM

Advocacy Lunch

Sponsored by 

1:30 PM - 2:30 PM



Breakout Session

Balance Sheet Strategies to Improve Yield: Strategically Deploying Excess Funds in Light of Potentially Rising Rates

Mark Wickard, Managing Director of Investments for the Credit Union Investment Strategy Group, Oppenheimer & Co. Inc.

Sponsored by 

This session will discuss the threat of possible rising rates on the horizon and what we can do as risk managers to address coming IRR and NEV pressures; Balance sheet strategies in investments and loan participations to add significant income; Proven strategies to find higher income, while decreasing risk to your CU in a rising rate environment; Strategic and Intelligent options for the possibility of needing liquidity again in the near future as lending slowly returns to normal.

1:30 PM - 2:30 PM



Breakout Session

Drama Free Skills

Dennis McIntee, CEO, Leadership Development Group

Upgrade Your Own Growth and Innovation

Creativity is not a gift people are born with, it's a capability you can develop. Even during challenging seasons, there are opportunities to grow. You need a process to unlock your ideas. As the author of several groundbreaking books on leadership, personal development, and success, Dennis offers this engaging presentation to learn the 5 mindsets for growth, explore how to increase collaboration on your team, discover how learning to manage your emotional state is the hidden key to creativity.

Thursday, November 18 (continued)

1:30 PM - 2:30 PM



Breakout Session

Preparing for Real-Time Payments

Toby Thomas, VP, Product Market Strategist, Corporate One FCU

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FEDERAL CREDIT UNION

Join us for this presentation on real-time payments where we'll review the essentials and help you understand the benefits of real-time payments for your credit union. We'll highlight the changes in payments trends, review the key differences between faster and real-time payments, discuss the cash management implications of around the clock payments and outline steps you can take to prepare for real-time payments. We'll also highlight how credit unions can better understand, gain experience with and take advantage of the opportunities immediate payments offer.

2:30 PM - 2:45 PM

Break

2:45 PM - 3:45 PM



General Session

Times They Are A Changin' - A Dynamic Fed and Your Credit Union

Dave Filby, Chief Investment Officer, Corporate America CU

Trey Rudder, Vice President Strategic Balance Sheet Management, Corporate America CU

Tanya DeVlieger, Member Investment Director, Corporate America CU

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CREDIT UNION

If the Federal Reserve follows through on indications they will begin tapering and raising rates in the near future, what investment and ALM issues are suddenly important again? Join CACU's team of experts for an update on the latest economic events and the impacts to your credit union.

4:00 PM - 6:00 PM

Exhibit Hall Reception

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Corporate Federal Credit Union

6:00 PM - 10:00 PM

Dinner On Your Own

8:00 PM - 10:00 PM



Exhibit Break-Down

Beer, Bourbon & Brent Browning

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FEDERAL CREDIT UNION  CUNA
MUTUAL
GROUP

After dinner, come join LSCU staff, attendees, guests and exhibitors for a great fall evening networking event under the stars! There are several reasons you will not want to miss this event:

- Craft beer and bourbon tasting provided by Fairhope Brewery
- Grab your favorite beer or wine and connect with old and new friends
- Hear great country covers mixed with some country fried rock from Nashville entertainer, Brent Browning
- And support the Southeast Credit Union Foundation (SECUF)'s Wine & Spirits Pull!

Southeast Credit Union Foundation (SECUF) Wine & Spirits Pull

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RESOURCES, INC.

Friday, November 19

8:00 AM - 9:00 AM

Breakfast

8:00 AM - 9:00 AM

Welcome Center/Registration Open

9:00 AM - 10:30 AM



Closing General Session

Courageous Leadership – Living a Life of Influence

Dan Meers, Mascot of the Kansas City Chiefs (KC Wolf) & Author

On November 23, 2013, Dan Meers came within inches of losing his life while practicing a bungee jump and zip line stunt at Arrowhead Stadium... home of the Kansas City Chiefs. What Dan anticipated being the thrill of a lifetime ended up being the spill of a lifetime. The stunt went terribly wrong and Dan plummeted 75 feet before crashing into the stadium seats. Miraculously Dan survived. He spent 9 days in the hospital and got some really big scars. Dan smiles when he says, "Scars are just Tattoos that come with a Cool Story". During this powerful presentation Dan shares his incredible story and the important lessons that he learned during his long road to recovery about leadership and about life.

SPEAKERS



Alisha Stair, CUCE, CCUF, CUDE, BSACS, CCUFC, Member Engagement Consultant, LSCU

Alisha has served as LSCU's Member Engagement Consultant for the state of Alabama since 2018. Before joining the LSCU team, Alisha found her way to credit union land serving as Illinois Educators Credit Union's Marketing and Indirect Lending Coordinator and a Young Professional Advisory Board Member for the Illinois Credit Union League. Alisha is a Bank Secrecy Act Compliance Specialist, Certified Credit Union Facilitator, Certified Credit Union Financial Counselor, and Credit Union Compliance Expert, and is passionate about helping credit unions grow and succeed.



Ben F. Brinkley III, Chief, Bureau of Credit Union Regulation, Florida Office of Financial Regulation

Ben Brinkley joined the Florida Office of Financial Regulation in July 2005. He worked as a Credit Union Examiner in the Jacksonville field office until November 2008, when he transferred to the Tallahassee headquarters to work as a Credit Union Analyst. In January 2011, he moved to the Bureau of Bank Regulation where he worked as the Administrator for the South Florida District. In January 2014, he took the position of Supervisor of the Tallahassee field office and was promoted to Area Financial Manager of the North Florida District in September 2017. In September 2019, he was promoted to Bureau Chief of Credit Unions. Before joining the Office of Financial Regulation, he worked as a loan officer in the Jacksonville office of Washington Mutual.



Bill Berg, MBA, CCUE, CUCE, BSACS, CUERME, VP, Compliance Training and Information, LSCU

Bill has been with the Florida Credit Union League (now the League of Southeastern Credit Unions-LSCU) since 1988. He is currently the longest tenured employee working for the LSCU.

Before that, he worked for the Jacksonville Branch of the Federal Reserve Bank of Atlanta for 11 years after graduating from FSU with undergraduate degree with a double major in Finance and Real Estate in 1975 and MBA with a Finance concentration in 1977.



Dan Meers, Mascot of the Kansas City Chiefs (KC Wolf) & Author

Dan began his career in 1986 at the University of Missouri - Columbia. Dressed as the school mascot, Truman Tiger, it didn't take long for Dan to establish himself as one of the top college mascots in the nation. After finishing second in 1988, Dan was selected the nation's #1 college mascot at the 1989 National Collegiate Mascot Championships. As graduation approached, Dan began to receive offers to use his talents at the professional level.

After graduating with honors, Dan decided to trade in his tiger stripes for bird feathers and began his professional career as Fredbird, the mascot for the St. Louis Cardinals baseball team. Although many thought Dan's "bird legs" were a perfect match for his costume in St. Louis, Dan stayed only a short time. He was offered a job in professional football and decided to exchange his bird suit to become a wolf.



Dave Filby, Chief Investment Officer, Corporate America CU

Dave has a Bachelor of Science degree in Business Administration from the University of Missouri with emphasis in Finance and Banking and Real Estate. Prior to his employment at Corporate America, he served 12 years with U.S. Central Credit Union rising to Director of Asset Liability. Prior to working at U.S. Central, he was the Senior Vice President-Client Strategies Group for Corporate Network Brokerage Services. Dave has a healthy obsession with travel, an unhealthy obsession with movies, and an extremely tolerant wife.



David Pace, CCUE, Manager, Regulatory Advocacy, LSCU

David Pace graduated from Georgia State University with Magna Cum Laude honors. He worked for the Nebraska Department of Banking and Finance as a Fintech examiner and interned for Associated Credit Union in the Compliance and ERM areas before joining LSCU as the Manager Regulatory Advocacy.



Dennis McIntee, CEO, Leadership Development Group

Dennis McIntee, a gifted keynote speaker and author, travels across the US speaking at leadership summits, management training events and healthcare conferences. So many people know Dennis as “The Drama Free Guy.” This is because Dennis understands that if you eliminate of unhealthy drama in the workplace, your teams will thrive and succeed. In addition to being a keynote speaker, he is also a leadership consultant passionate about helping leaders create high-trust, high-performance cultures. Dennis is the author of The 8 Qualities of Drama Free Teams, The Power of Pursuit, Drama Free Teams in Healthcare, Drama Free Productivity, Drama Free Relationships.



Fred Palmer, Executive Benefits Specialist, CUNA Mutual Group

Fred is an executive benefits specialist for CUNA Mutual Group, a company that specializes in the design, implementation, financing and ongoing administrative support of supplemental executive benefits programs specifically tailored to credit unions. He works with credit unions in the east and central regions. He brings to CUNA Mutual Group his experience in the financial services industry since 1981. Prior to joining CUNA Mutual Group in 2013, Palmer consulted with credit unions and banks as a senior consultant and regional vice president for two major executive benefit firms. In addition to 20 years of executive benefits consulting experience, he also has 20 years of senior management banking experience with expertise in trust, investments, corporate lending and private banking.



H. Greg McClellan, Administrator, Alabama Credit Union Administration

H. Greg McClellan has spent over 40 years in the financial services industry, including management of Internal Audit departments for two bank holding companies. He was employed by MAX Credit Union from November 1984 to June 2019, serving the last 14.5 years as President/CEO. Since June 2019, Mr. McClellan has been serving as Administrator of the Alabama Credit Union Administration. He also serves on the Montgomery Chamber Board of Directors. He also serves on many other organization groups and boards- member of the Montgomery Committee of 100, member of the Air University Foundation Board of Trustees, and Chair of Baptist Medical Center East Board of Directors.



JoAnna Brandi, Author and Chief Happiness Officer, JoAnna Brandi & Company, Inc.

President of JoAnna Brandi & Company since 1990, JoAnna is a consultant, a public speaker and the author of two books on customer loyalty, Winning At Customer Retention, 101 Ways to Keep ‘em Happy, Keep ‘em Loyal and Keep ‘em Coming Back and Building Customer Loyalty- 21 Essential Elements in Action as well as a gift book on positive thinking 54 Ways to Stay Positive in a Changing, Challenging and Sometimes Negative World. She has written over 500 articles, worked with companies that range in size from multinationals to small privately held companies, and has been named the #1 Speaker at the Inc. Conference on Customer Strategy.



Laura Lee Vann, Senior Director, Shared Branching, Shared Cooperative Services

Laura Vann has more than 30 years experience working with not-for-profit organizations in member relations, business development, communications, training, and fund-raising positions. Currently, Laura serves as Senior Director, Shared Branching at Shared Cooperative Services. In this role, she facilitates cooperation among Alabama and Georgia credit unions in the development and operation of the shared branching network; develops and executes strategies to increase the number of credit union members with access to shared branching; and conducts training on shared branching rules and regulations.



Mark Wickard, Managing Director of Investments for the Credit Union Investment Strategy Group, Oppenheimer & Co. Inc.

Mark B. Wickard is the Managing Director of Investments for the Credit Union Investment Strategy Group of Oppenheimer & Co. Inc. Since 1986, Mark has been consulting and educating credit unions nationwide. With education as the core foundation of everything he does – his clients become forward thinkers, informed buyers and sellers, and they better comprehend the nuances of investment strategies employed – and therefore are able to keep their boards more informed, educated and prepared for regulatory reviews and audits.



Melissa Sneed, Deputy Commissioner for Supervision, Department of Banking and Finance

Melissa Sneed is the Deputy Commissioner for Supervision for the Georgia Department of Banking and Finance (Department). As the Deputy Commissioner for Supervision, she is responsible for oversight responsibility for all Georgia state-chartered financial institutions including banks, credit unions, holding companies, and non-depository trust companies. Melissa is also Certified Examination Manager. Melissa joined the Department in 1999 as an Assistant Financial Examiner and was promoted to District Director of the Northwest District in 2008. In 2016, she was appointed Deputy Commissioner for Supervision. Melissa is a graduate of the University of Georgia with bachelor's degrees in Finance and Risk Management & Insurance.



Patrick La Pine, CEO, LSCU & Affiliates

Patrick La Pine serves as the Chief Executive Officer of the League of Southeastern Credit Unions & Affiliates. LSCU is the regional trade association representing the interest of 330 credit unions in Alabama, Florida and Georgia. The League's core services include advocacy, compliance services, cooperative initiatives, education & training and communications. Additionally, through its wholly owned holding company, Affiliates Consolidated Services, LSCU & Affiliates works to provide efficiencies through shared services for a family of companies, as well as by leveraging the resources of its for-profit business units to promote growth, profitability and sustainability by bringing best in class solutions to market for its clients.



Raven Solomon, Author, Strategist, Global Diversity, Equity, and Inclusion Thought Leader

Raven Solomon is a global Diversity, Equity, and Inclusion thought leader and nationally recognized keynote speaker who helps organizations get future-ready by understanding generations, racial equity, and their intersection. Raven's mission is simple-- to solve for racial inequity by breaking down generational and racial barriers in the workplace, replacing them with empathy and synergy that fosters productive working relationships, drives business results, and prepares organizations to compete in the not-so-distant future.



Ray K. Ragan, M.Adm (PM), CS&R, PMP, Chief Strategy Officer, We Florida Financial

Ray K. Ragan, MAd (PM), CS&R, PMP worked in banking, defense, and FinTech, focusing on digital transformation and technology strategy. Currently, he is the Chief Strategy Officer for the Fort Lauderdale-based We Florida Financial Credit Union. He recently took a FinTech to revenue and is a regular author in strategic execution and innovation. As a Soldier, Ray innovates for the Army, solving the hardest big data problems. He is passionate about strategy, with advanced studies in strategy as a civilian and service member.



Tanya DeVlieger, Member Investment Director, Corporate America CU

Tanya is a Member Investment Director assisting member credit unions in selecting and using the appropriate investing and funding strategies to optimize their performance. Tanya's financial career began in 1990 when she went to work for a CPA firm. Nine years later she joined the National Credit Union Administration (NCUA) as a natural-person Credit Union Examiner, specializing in capital markets. In 2003, she was promoted to a Corporate Credit Union Examiner, providing exposure to larger, more complex investments and ALM strategies. Prior to joining Corporate America Credit Union, Tanya worked for another corporate credit union for nine years.



Toby Thomas, VP, Product Market Strategist, Corporate One FCU

As a Product Market Strategist, Toby is responsible for creating a competitive advantage for Corporate One and its national field of membership by designing, supporting, and orchestrating growth-oriented Go-To-Market strategies for new products and services and analyzing and adjusting existing product market strategies. With nearly 20 years of experience in the credit union industry he has gained in-depth knowledge of the many complex aspects needed for successful cooperation among cooperatives through leadership positions in areas of national sales, investment and portfolio strategies, and successful correspondent financial products development.



Tony Roberts, CCUE, Compliance Consultant, LSCU

Tony Roberts graduated from the University of South Alabama. He has worked in the insurance industry as well as in compliance and risk management for credit unions. He is currently one of LSCU's Compliance Consultants with client credit unions in Florida, Georgia and Alabama.



Trey Rudder, Vice President Strategic Balance Sheet Management, Corporate America CU

Trey is responsible for the Strategic Balance Sheet Management Department at CACU. His group measures and monitors Interest Rate Risk for Corporate America as well as balance sheet solutions for member credit unions. Trey has nearly 20 years balance sheet management experience with other southeastern institutions such as Southeast Corporate, AloStar Bank of Commerce, AmSouth, and Compass Bank. Trey is the corporate's designated outdoors person. He participates in all golf, fishing, and shooting activities.