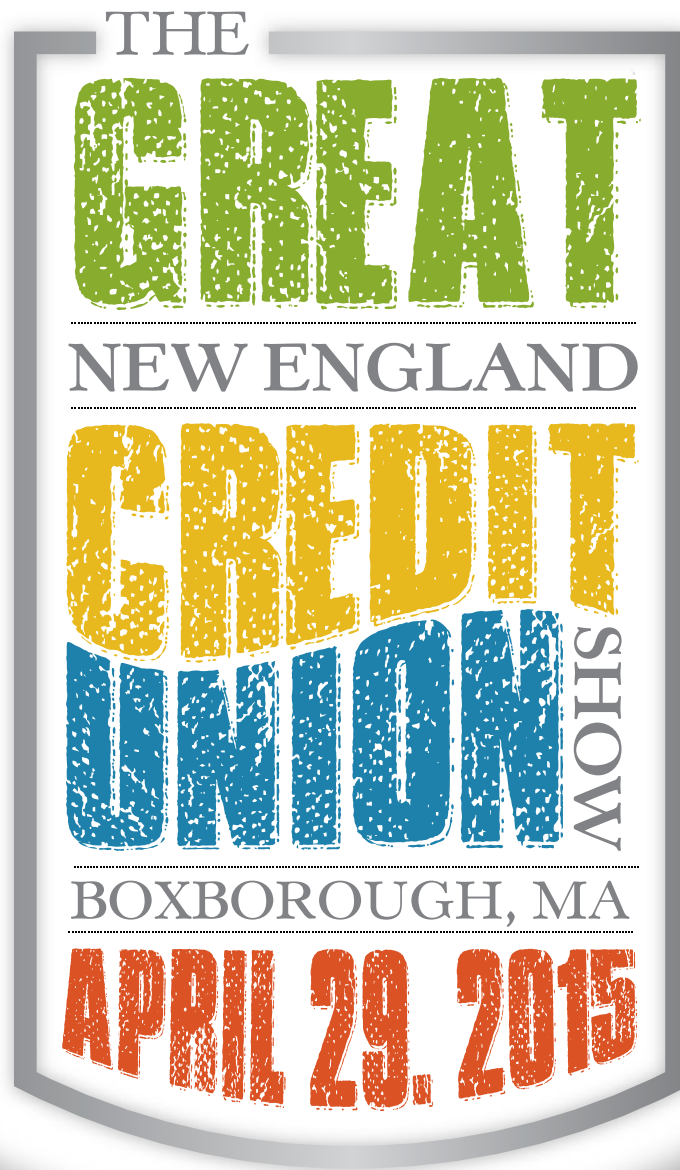


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# WELCOME TO THE GREAT NEW ENGLAND CREDIT UNION SHOW!



**Paul Gentile**  
President/CEO  
Cooperative Credit  
Union Association

All the latest in cutting-edge products, technology and services needed to operate your financial cooperative . . . Educational sessions designed to foster new and innovative thinking . . . Networking opportunities where you can sow new relationships and rekindle ones from years past.

Welcome to the Great New England Credit Union Show, now in its seventh year of fueling the success of credit unions and the lifestyles of their members.

No other event in New England comes close to hosting credit union attendees and high-quality service providers under one roof, where products ranging from data processing and marketing to lending and mobile banking take center stage.

The Great New England Credit Union Show offers you this showcase where you can evaluate all these products and services. I encourage you to take your time in the exhibit hall. Meet some new potential business partners and learn how they can help you move into the future.

This show isn't about "selling" credit unions it's about getting educated on your ability to better serve your members.

And just like the credit union system, this Show is all about people. During your time here, you'll have a unique opportunity to network with your peers from credit unions all throughout New England. Learn how they are meeting the challenges of today.

While you catch up with familiar colleagues, remember to also make time to introduce yourself to some of the new folks who may be attending the Show for the very first time. They, too, may be facing the same challenges as your credit union, so extend them a welcoming hand.

You well know, education is a core component of the credit union experience. This Show would not be complete without a line-up of dynamic speakers ready to ignite your imagination, fuel your thinking and generate a conversation that can last for days. So get involved. Ask questions and above all, share your thoughts. They may just be the gem someone else is looking to hear.

As you start this day, consider setting a goal for your experience. Whether it's learning about a product your credit union doesn't offer or taking time to understand a new strategy from a peer, find your "takeaway." But most of all have fun and enjoy the Show!

Paul Gentile  
President/CEO

# SCHEDULE AT A GLANCE

8:00 A.M.

Exhibit Hall & Continental  
Breakfast Open

8:00 A.M.

SBA Meeting

9:00 A.M.

Concurrent Seminars

10:15 A.M.

Concurrent Seminars

11:30 A.M.

Concurrent Seminars

12:15 P.M.

Buffet Lunch

12:15 P.M.

Leadership Luncheon  
*(by invitation)*

1:30 P.M.

Concurrent Seminars

2:15 P.M.

Raffle Announcements

2:30 P.M.

Keynote Address

3:15 P.M.

Exhibit Hall Closes and  
Networking Reception Begins

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# AGENDA

## 8:00 A.M. – 9:00 A.M.

### SBA Meeting - Directors Room

Guest Speaker [Pamela Esche](#), Regional Lending Specialist, NCUA

## 9:00 A.M. – 9:45 A.M. CONCURRENT SESSIONS

### Identify, Protect, Detect, Respond, Recover Why Every Credit Union Should Be Using the NIST Cybersecurity Framework - Seminar Room



John Rogers



Zachary Zimmerman

The NIST Cybersecurity Framework is the core of a national standard to measure cybersecurity and one that the regulatory agencies are expecting financial institutions to use. The framework enables organizations – regardless of size, degree of cybersecurity risk, or cybersecurity sophistication – to apply cybersecurity principles and best practices to ensure the security and resilience of critical infrastructure and to protect members from harm. This session will explore the how and why of adoption and implementation.



If your institution has adopted the NIST Cybersecurity Framework, this is the place to share your experience. If you haven't started yet, this session will answer the question as to why you should!

**Presented by** [John Rogers](#), CISSP, Advisory Services Practice Manager and [Zachary Zimmerman](#), GCIH, GCIA, Assurance Services Practice Manager, Sage Data Security

### Auto Lending From A Dealer's Perspective Cotillion Room



Bob Nealon



On average, 8 of 10 vehicles sold at dealerships are financed at the point of sale. Understanding a dealer's perspective improves a Credit Union's ability to execute a successful automotive lending program. Improve your understanding of the dealer's perspective. Join CU Direct Regional Vice-President Bob Nealon as he facilitates a panel of local automotive dealership executives covering topics such as lending programs, lender relationships, regulatory compliance, industry trends and more.

**Presented by** [Bob Nealon](#), Regional Vice President, CU Direct

### Driving Non-Interest Income Using Profit Participation Programs - Directors Room

Shrinking margins and lost revenue do not need to define your Credit Union. Learn how to drive non-interest income through Retrospective and Reinsurance profit participation programs. You will discover how to participate in the underwriting profits



Mark Giguere



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and investment income of the products you already offer your members. Vehicle Service Agreements, Powersports Agreements, and GAP addendum sales create underwriting profits for the administrator. Why not your Credit Union? Learn what automobile dealers have known for twenty years. Profit participation programs can produce significant net income at no cost.

**Presented by** [Mark Giguere](#), President, Superior Lending Solutions LLC, [Tony Anderson](#), Vice President of Claims & Underwriting, Century Automotive Service Corporation

### A Strategic Approach to Regulation - Colonial Room



Sean Carter



Your Trusted Resource in Payments

Regulation is not always compliance and bad news: not only can regulatory controls protect your payments business, it also can provide you with data and information about your member relationships – data you can use to provide additional value to businesses and consumers. Given the significant investment you make in regulatory compliance, it makes sense to leverage any upside advantages. Discover how your credit union could benefit by taking a strategic approach to payments regulation.

**Presented by** [Sean Carter](#), AAP, Senior Vice President, Payments Strategies, NEACH

## 10:15 A.M. – 11:00 A.M. CONCURRENT SESSIONS



Michael Kannan



Jackson Schultz

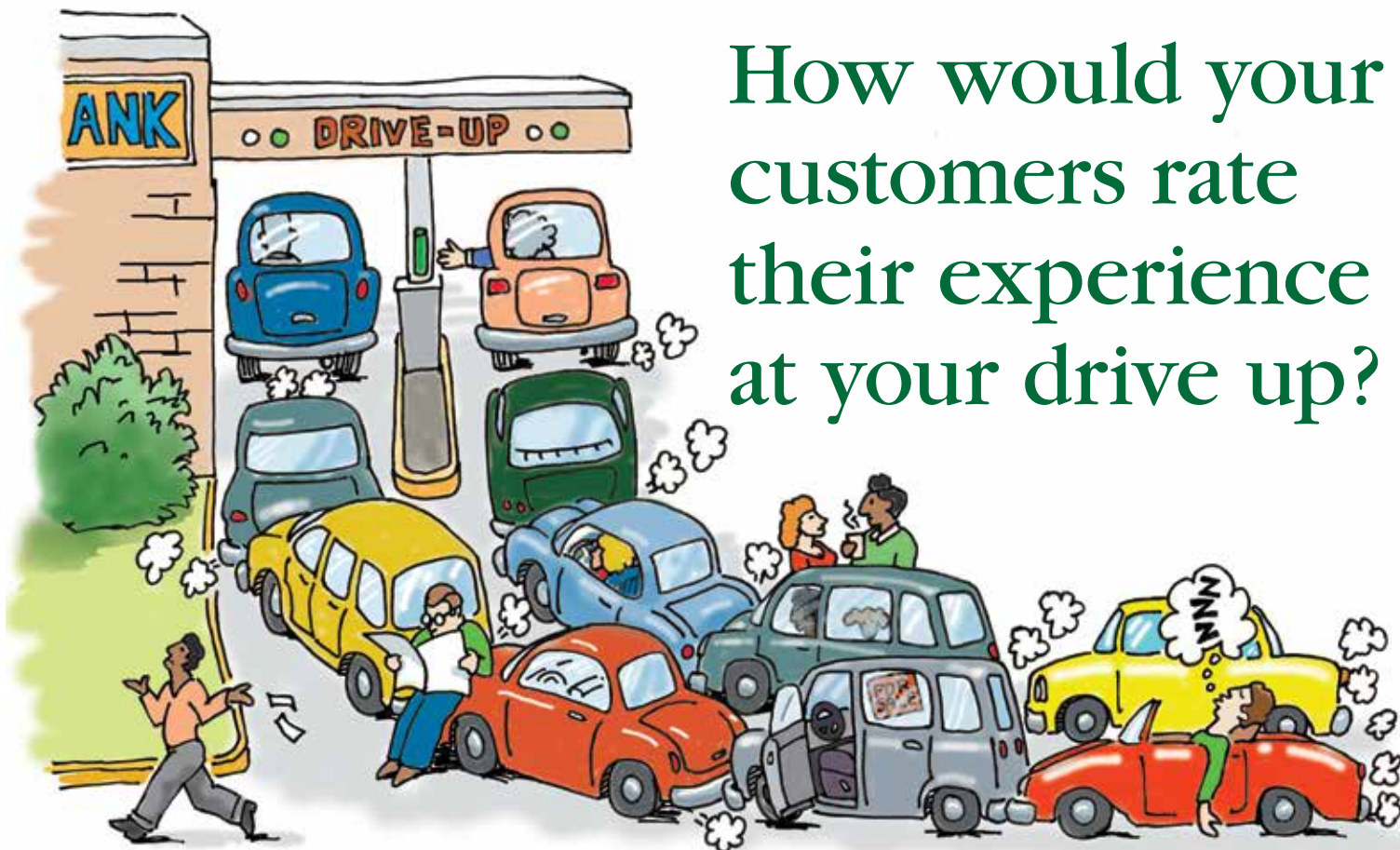


ASSOCIATES

### RFID Hacking: Reconsidering Physical Security - Seminar Room

RFID entry systems have become the preferred method for securing access to non-public areas in branches and operations centers. But hacking RFID may be easier than you think. This seminar will use both theory and demonstration to challenge the notion of RFID-based access control systems, providing insight into how the scope of vulnerability assessment and social engineering testing can be expanded to ultimately improve your institution's security posture.

**Presented by** [Michael Kannan](#), Senior Security Consultant, Gravoc Associates, Inc. and [Jackson Schultz](#), Security Consultant



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Jeff Gray



Doug MacDonald

### **The Profitable Use of Member Data - Cotillion Room**

This program will be engaging and interactive for C-level credit union staff to see how profitable member data can be used for targeted marketing and produce a return on investment.

Presented by **Jeff Gray**, Senior Vice President, Synergent and **Doug MacDonald**, Vice President, Synergent

### **The Path to Value in the Cloud - Directors Room**



Brian Kern



With the widespread migration into cloud computing, there has come a fundamental shift in business processes and how organizations interact with customers, partners, and employees. This transformation is taking businesses in a different direction, bringing incredible opportunities including the ability to build a real-time enterprise where interaction and innovation flourish, and more agile, flexible, and cost-effective practices thrive. However, the path to value is not clearly marked leaving potential stumbling points along the way.

Join this interactive session where the following topics will be discussed:

- What factors affect businesses today and how the cloud can address these.
- Where organizations are in the cloud migration process and their specific pain points.

Presented by **Brian Kern**, Regional Director of Hosted Solution Sales, Windstream Communications



Ryan J. Rodrigue



### **Cybersecurity – Are You Ready for What's Next? Colonial Room**

The Regulators have been busy. They have been highlighting areas where Institutions could do better with cyber security and added some recommendations for institutions to adopt in the wake of all the cyber security threats being presented. In our presentation attendees will learn:

- How cybersecurity affects your current risk assessment processes
- How to choose the right person to be responsible for preparedness
- What additional information your training programs should contain
- How and what to report to your Board
- What other programs will be impacted by the increase in Cybersecurity requirements

If you deal with any of the areas above, you don't want to miss this session!

Presented by **Ryan J. Rodrigue**, CISA, CISSP, IT Assurance Senior Manager, Wolf & Company, P.C.

## **11:30 A.M. – 12:15 P.M. CONCURRENT SESSIONS**

### **Hedging your Credit Union's Interest Rate Risk Seminar Room**



Jim Beattie



David Sweeney



Navigate the NCUA application process and use derivatives in compliance with its guidance BBN presents Chatham Financial, a leading independent derivatives advisor for financial institutions, to discuss how credit unions can utilize interest rate derivatives to mitigate

interest rate risk within the framework outlined by the National Credit Union Administration.

Hosted by BBN, featuring **Jim Beattie** and **David Sweeney** of Chatham Financial

### **The Emergence of the ISO in Community Financial Institutions Cotillion Room**



Bill Lodovico



With issues as complex as regulatory compliance, oversight and cybersecurity, financial institutions cannot afford to take half measures. IT security issues represent a continuous threat to the integrity of an institution's data, while the amount of information examiners demand regarding your policies, procedures and safeguards continues to grow. Recent regulatory guidance is requiring community Financial Institutions to address the role of Information Security Officer (ISO). Join us in an informative session to learn how to effectively employ the ISO to stay ahead of cyber threats and meet regulations.

Presented by **Bill Lodovico**, Sr. I.T. Security & Compliance Consultant, All Covered



Dan Roderick



### **Stop the Bleeding with Value Checking. A Simple Strategy to Increase Fee Income That Is Better than Overdraft Privilege! Directors Room**

The rules of the game have changed. Increased regulation and economic conditions have converged to lower loan demand, compress spreads, and limit fee income opportunities across the industry. Achieving profitability objectives has never been more challenging.



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Maintaining your health starts by strengthening your core. Maintaining the financial and operational health of your financial institution is no different. A strong and flexible core should be at the heart of your institution.

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Exercise your right to learn how COCC can strengthen your core. Call us today at 888.678.0444 or visit our website at [www.cocc.com](http://www.cocc.com)



Service Fee Income is more important than ever. At present, the typical credit union earns 85% of fee income from less than 8% of the member base. Do you really want all your fee income eggs in one basket? During this session, gain valuable insight into the profitability dynamics and distribution of your core member base. Learn how to achieve a significant increase in fee income while maintaining customer loyalty.

Presented by **Dan Roderick**, CEO, Strunk, LLC

## **New Advances in Statement Processing – Using Your Statements to Cross-Sell Products, Keep Customers informed and generate Income! - Colonial Room**



David Schunke



Financial institutions must rely on improved technology that will secure a greater market share while simplifying their clients' everyday life. They must adapt by finding new value in existing systems and ways to explore new market opportunities while improving the quality of their products and services. So why not take your monthly statements and transform them into a marketing tool that can increase revenue and reduce expenses.

Presented by **David Schunke**, SVP Sales, Financial Services, Inc.

## **12:15 BUFFET LUNCH - Courtyard**

## **12:15 P.M. – 1:00 P.M. (Invitation Only)**

### **LEADERSHIP LUNCHEON - Grand Ballroom**



Tom Slefinger

## **Introduction Remarks by Seth Goodall, SBA Regional Administrator**

Keynote Speaker - Tom Slefinger, Senior Vice President & Director of Institutional Fixed Income Sales, Balance Sheet Solutions

## **1:30 P.M. – 2:15 P.M. CONCURRENT SESSIONS**

### **Meeting The Challenges For Attacks, Breaches & Compliance - Seminar Room**



Dean Marshall



In the recent 12 to 18 months, many national headlines focused on major companies that have suffered significant breaches. As credit unions find themselves increasingly under attack by highly skilled criminals, where should they fortify their defenses? The credit union, its members and its product lines face new challenges managing cyber risks. Even in a perfect world with an unlimited budget to purchase security

products and hire security experts, a credit union could not be fully 100% secure. By far the best approach is to continually strive to develop and maintain an integrated security strategy. This seminar will discuss current trends in technology and policy guidance to reduce breach risks and keep examiners satisfied.

Presented by **Dean Marshall**, CISSP, Executive VP, eScope Solutions Inc.

### **An Introduction to America's Credit Union Museum Foreword by Paul Gentile, CEO, CCUA Cotillion Room**



Paul Gentile



Stephanie G. Smith

Housed in the building where our country's first credit union was born, America's Credit Union Museum offers a one-of-a-kind interactive experience that brings to life a movement as relevant today as it was over 100 years ago. The Museum is more than a collection of artifacts and documents. It's the soul of an unwavering national movement of people helping people.

America's Credit Union Museum honors our shared history, documents today's achievements, helps credit unions prepare for tomorrow's challenges, and inspires our industry's collective future. The

credit union movement continues to grow and succeed thanks to the commitment of its leaders. America's Credit Union Museum preserves their legacies and encourages each new generation of credit union leaders to reach further.

America's Credit Union Museum has embarked on a three year campaign to expand exhibit space, renovate existing meeting facilities and create a national research library. The museum's executive director, Stephanie Smith, will share the vision and inspiration behind the Legacy Campaign.

Presented by **Paul Gentile**, President/CEO, Cooperative Credit Union Association, **Guest Speaker Stephanie G. Smith**, Executive Director, America's Credit Union Museum



Jason Hills



### **The Rise of Online Lending - Directors Room**

Online lending is erupting with new and disruptive models that seek to capture the next generation of borrowers. These alternative lenders are obtaining a competitive advantage through operational efficiencies, technology, and improved algorithmic risk analysis models. You will discover the online lending market, and how you can succeed in capturing the new generation of borrowers.

Presented by **Jason Hills**, Senior Vice President of Sales, LendKey



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## Hiring and Firing and Everything in Between Colonial Room



Jack D. Williams



This seminar will cover the “nuts and bolts” of employment from hiring to firing, including applications and hiring (background checks, interviews, orientation and training), employment documentation (job descriptions, offer letters and employment agreements, employee handbooks, arbitration agreements, confidentiality agreements), employee relationships (social media, counseling and discipline, harassment and discrimination, retaliation, investigation of employee complaints, documentation of employment issues) and termination (documentation, severance options, release agreements, post-termination checklist). Focus throughout will be on avoiding employee claims (EEOC, unemployment claims, insurance consideration, preparing for litigation).

Presented by Jack D. Williams, Senior Consultant II, Risk Management, CUNA Mutual Group

## 2:30 P.M. - 3:15 P.M. GENERAL SESSION



Chris Skinner

### Keynote Address - How Credit Unions Can Become Digital Titans - Grand Ballroom

Chris Skinner Author, Digital Bank; CEO, Balatro Ltd; and Chair of the Financial Services Club

## 3:15 P.M. NETWORKING RECEPTION - Grand Ballroom

## EXHIBIT HALL CLOSES

Cloud Computing | Managed Hosting & Monitoring | End-User Support | Remote Services | Backup/Recovery Services | IT Consulting



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Our goal at eScope Solutions is to bring technology into play that is integrated and works in harmony. All too often we see silos of technology and various end-point solutions inefficiently cobbled together. We take a holistic approach by installing solutions that are specifically designed to avoid the "security patchwork" syndrome. We prioritize these systems based on each credit union's specific needs and budgets. This approach has been a successful one for us since 1992 as evidenced by the fact that we now provide specialized networking and security services to over 400 clients in 41 states.



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# FLOOR PLAN & RAFFLE PRIZES

Booth #	Company	Raffle Prize
400	Akcelarant	
10	All Covered	
110	Allanach Mortgage Group Corp	
700	Alliance, LLC.	
390	Allied Solutions LLC	
20	Alloya Corporate FCU	Kindle Fire
440	AnnieMac Home Mortgage	
800	BBN	Bose speaker
150	Birchwood Credit Services	
740	BoliColi.com	Go Pro
50	Burns-Fazzi, Brock & Associates	
180	Cathedral Corporation	
720	CliftonLarsonAllen	
680	COCC	
670	CO-OP Financial Services	
710	Cooperative Systems	
170	Credit Union Insurance Resource, LLC.	
380	CU Direct	
360	CU Members Mortgage	
770	CUAlliance	
890	CUERA	\$100 Visa Gift Card
370	Cummins Allison	
860	CUNA Mutual Group	GoPro Camera
650	Customized Service Concepts	
480	D3 Inc.	Amazon Fire HD Tablet
190	Deluxe	
300	eDOC Innovations	iPad Conversion Keyboard & Case
840	EDR	
820	Enterprise Car Sales	\$100 Gas Card
520	eScope Solutions Inc.	
690	FivecoSolutions LLC	
630	FSI	
560	G.T. Reilly & Company	
220	GraVoc	\$100 Amazon Gift Card
580	GreenPath Financial Wellness	
620	Greylock FCU/Greylock Insurance	
	Bose Noise Cancelling Headphones	
750	Higgins	
100	HUB Technical Services LLC.	
780	Innovative Business Systems, Inc.	\$50 Visa Gift Card

(120) The Warren Group	(130) Norcom Mortgage	(140) NES Group	(150) Birchwood Credit Services	(160) Sharetec Systems
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(110) Allanach Mortgage Group Corp
(100) HUB Technical Services LLC.
(90) Raddon
(60) Route 66 Warranty
(50) Burns-Fazzi, Brock & Associates
(40) New England Money Handling Systems

(770) CUAlliance	(760) Superior Lending Solutions
(780) Innovative Business Systems, Inc.	(750) Higgins Corp
(790) Security Management Partners	(740) BoliColi.com
(800) BBN	(730) Sage Data Security

(600) Windstream
(610) OM Financial Group
(620) Greylock FCU Greylock Insurance
(630) Financial Services, Inc.

(810) NEACH	(720) CliftonLarsonAllen
(820) Enterprise Car Sales	(710) Cooperative Systems
(830) PENTA Communications, Inc.	(700) Alliance, LLC
(840) EDR	(690) Fiveco Solutions LLC
(850) Wolf & Company P.C.	(680) COCC

(650) Customized Service Concepts
(660) PDP Group, Inc.
(665) John M. Floyd & Associates
(670) CO-OP Financial Services

## PODCAST

(30) Ventus
(20) Alloya Corporate FCU
(10) All Covered

(860) CUNA Mutual Group	(870) MemberClose	(880) Partner's Benefit Group	
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## ENTRANCE

525	Integrated Security Group ~ISG
665	John M. Floyd & Associates
490	Lee & Mason Financial Services, Inc. \$100 Amazon Gift Card
930	LendKey

	(170) Credit Union Insurance Resource, LLC.	(180) Cathedral Corporation	(190) Deluxe	(200) LoanStreet LLC	(210) Macpage LLC
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	(590) Magee Company
	(580) GreenPath Financial Wellness
	(570) Systems Engineering
	(560) G.T. Reilly & Company

(430) Marcum LLP	(410) Strunk, LLC
(440) AnnieMac Home Mortgage	(400) Akcelarent
(450) Teledata Communications Inc.	(390) Allied Solutions LLC
(460) New England Design Associates	(380) CU Direct

COFFEE, DESSERTS,  
AND REFRESHMENTS

	(540) Strategic Information Resources Inc.
	(530) Saylent Technologies
	(525) Integrated Security Group ~ISG
	(520) eScope Solutions Inc.

(470) MetLife	(370) Cummins Allison
(480) D3 Inc.	(360) CU Members Mortgage
(490) Lee & Mason Financial Services, Inc.	(350) Ongoing Operations LLC
(500) New England College of Business	(340) Solidus
(510) Synergent	(330) Love My Credit Union Rewards

(220) GraVoc
(260) Spectrum Business
(280) Raoust+Partners
(290) PSCU
(300) eDOC Innovations
(310) Members Mortgage Company, Inc.
(320) UBS

(890) CUERA	(900) PowerPay	(910) Winbrook	(920) Malauzai Software	(930) LendKey
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200 LoanStreet LLC  
330 Love My Credit Union Rewards  
210 Macpage LLC  
590 Magee Company

Booth #	Company	Raffle Prize
920	Malauzai Software	
430	Marcum LLP	
870	MemberClose	
310	Members Mortgage Company, Inc.	
470	MetLife	\$100 Home Depot Gift Card
810	NEACH	2 \$100 AMEX Gift Cards
140	NES Group	
500	New England College of Business	\$25 AMEX Card
460	New England Design Associates	
40	New England Money Handling Systems	
	2 Box Seats for The Boston Red Sox	
130	Norcom Mortgage	
610	OM Financial Group	
350	Ongoing Operations LLC	
880	Partner's Benefit Group	
660	PDP Group, Inc.	
830	PENTA Communications, Inc.	
900	PowerPay	
290	PSCU	
90	Raddon	
280	Raoust+Partners	
60	Rt 66	
730	Sage Data Security	
530	Saylent	
790	Security Management Partners	\$50 AMEX Gift Card
160	Sharetec Systems	
340	Solidus	
260	Spectrum Business	
540	Strategic Information Resources Inc.	Kindle
410	Strunk, LLC	iPad Mini
760	Superior Lending Solutions	
510	Synergent	
570	Systems Engineering	
450	Teledata Communications Inc.	
320	The Credit Union Advisory Group at UBS	
120	The Warren Group	
30	Ventus	\$100 Amex Card
910	Winbrook	
600	Windstream	
850	Wolf & Company P.C.	

# KEYNOTE SPEAKER PROFILES



**Tom Slefinger**

Senior Vice President and  
Director of Institutional  
Fixed Income Sales,  
Balance Sheet Solutions

**Tom Slefinger**, Senior Vice President and Director of Institutional Fixed Income Sales, Balance Sheet Solutions

As Senior Vice President, Director of Institutional Fixed Income Sales, Tom's primary role is to develop and manage operations associated with Institutional Fixed Income Sales with ISI. In addition to providing strategic direction to the overall group, Tom is heavily involved in analyzing portfolios, developing investment portfolio strategies and identifying appropriate sectors and securities with the ultimate goal of optimizing investment portfolio performance at the credit union level.

Prior to joining Balance Sheet Solutions, Tom was a Senior Vice President and Principal of Van Kampen Investments, a wholly-owned subsidiary of Morgan Stanley. In this role he was responsible for managing their Quantitative Risk Management Department, and overseeing the development and implementation of portfolio strategies and risk processes across a diverse family of fixed income funds with assets approximating \$25 billion. Also, as a senior fixed income portfolio manager, Tom was responsible for successfully developing and managing various global fixed income funds, as well as managing one of the largest mortgage security funds in the country.



**Chris Skinner**

Author, Digital Bank; CEO,  
Balatro Ltd; and Chair of  
the Financial Services Club

**Chris Skinner**, Author, Digital Bank; CEO, Balatro Ltd; and Chair of the Financial Services Club

Chris Skinner has been in technology and banking for many years and mixes the best of old school and cutting edge in his work.

He is one of the most influential and prolific thought leaders on the future of banking, finance and technology: His blog was chosen as best by The Financial Brand and in 2014 Chris was named by the Wall Street Journal as one of the Top 40 Fintech influencers globally, one of the eight Fintech leaders you need to follow by Deluxe, and a Fintech Titan by Next Bank. The World Economic Forum invited Chris for their project: Technology and Innovation in Financial Services: Scenarios to 2020.

In Europe, he is well-known as the Founder and Chairman of the Financial Services Club, a network for financial professionals that focuses upon the future of financial services through the delivery of research, analysis, commentary and debate. Founded in 2004, the Financial Services Club meets regularly across Europe with centres in Austria, England, Ireland, Norway, Poland, Scotland, Slovakia and Sweden. He is also CEO of Balatro Ltd., a financial research company.



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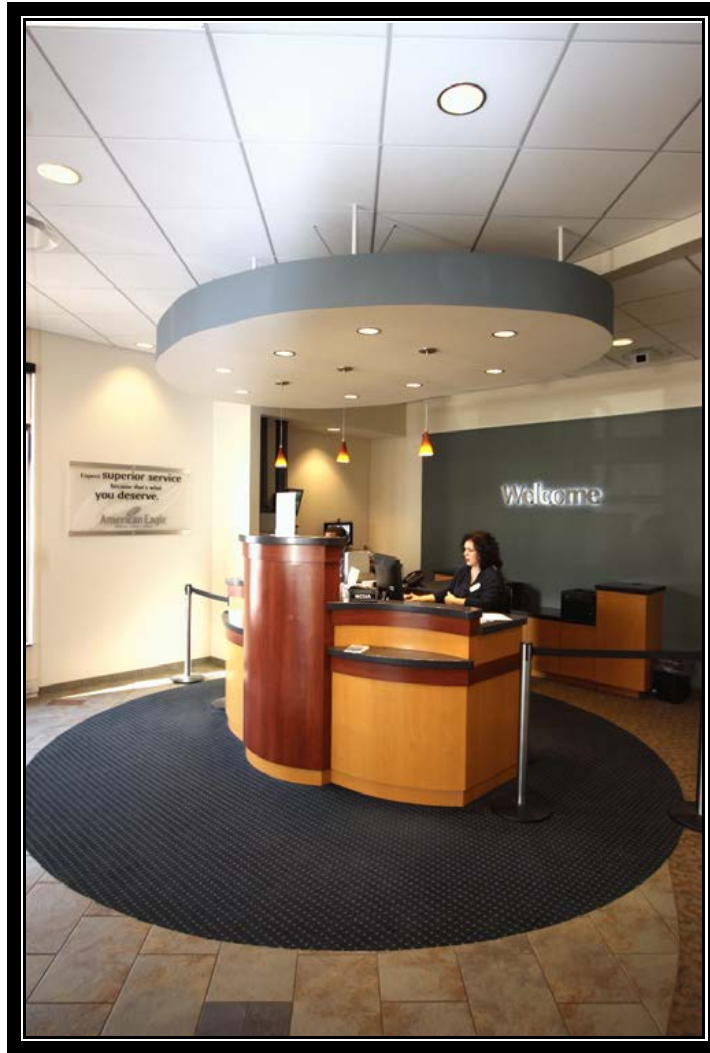
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