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B&A provides more than 600 credit unions with ALM and budgeting solutions and consulting. Second opinion ALM analyses are performed as well. ALM analyses include instrument-level modeling of imported loans, shares, and certs. Investment imports with many bond accounting providers. ALM outsourcing reports or the in-house CU/ALM-ware System include the NCUA's NEV Supervisory Test, five-year income simulation, NEV, non-maturity share valuation, contingency funding stress tests, what-ifs, historical key ratios. CU/BUDGET-ware can produce strategic plans out to five years. Annual strategic conferences, board/ALCO education, papers, backtesting for validations, consulting, model policies: ALM, investments, liquidity, concentration risk and contingency funding plan. Investment advisory services by Brick Capital Management.

**CUES**

5510 Research Park Dr., Madison, WI 53711

P: 608-288-5320

[www.cues.org](http://www.cues.org)**Erin Templar**Director of Marketing  
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CUES is an international membership association dedicated to the talent development of credit union CEOs, directors, and future leaders. Our offerings – from our highly acclaimed institutes to an array of online services and progressive strategic solutions – are the premier professional development programs in industry today helping credit union leaders reach their greatest potential.





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Credit Union Investment Strategy Group of Oppenheimer & Co. Inc. is an institutional fixed income consulting group helping credit unions throughout the country address the unique needs of their investment portfolios. At Oppenheimer, we understand that – which is why we developed services that are tailored specifically for credit unions. Our investment strategies and educational programs are ideal for any credit union that wants to try to get more out of its investment portfolio and take its investment knowledge to the next level. Contact us to see what we can do for your credit union.



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The Baker Group is one of the nation's largest independently owned securities firms specializing in investment portfolio and asset/liability management for credit unions. We have helped our clients maximize investment portfolio performance through total balance sheet management for 40 years. Our proven approach of total resource integration for credit unions utilizes software and products developed by Baker Software Solutions combined with the firm's investment experience and advice.

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GreenPath Financial Wellness is a national non-profit working to "remix the American Dream so that it works for everyone." Since 1961, GreenPath has focused on counseling and educating credit union members to manage debt, prepare for large purchases, and make informed financial decisions. GreenPath has been working in collaboration with Credit Union National Association to serve America's credit unions for more than 10 years



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Madison's Credit Union Investment Management Services provide clients with the opportunity for enhanced portfolio yields and earnings through risk management and portfolio optimization. We offer investment advisory services, and provide investment solutions for total benefits pre-funding and charitable donation accounts. As a fiduciary, we deliver objective, fee-based advisory services (commission-free) that fit within clients' balance sheet risk profiles.

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Lending Solutions Consulting Inc. (LSCI) is the industry leader in providing training and consulting services to credit unions across North America. Rex Johnson founded the University of Lending, a comprehensive five-day lending school in 1996. He and his team of experts have since trained over 50,000 credit union employees, helping credit unions achieve dramatic improvements in their loan yields, ROAs, and member service practices. In addition to the University of Lending, LSCI offers onsite consulting, portfolio analysis, and our newest service; Smart Loan Audit.

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O'Rourke & Associates offers a wide range of executive search services nationwide exclusively to the credit union industry. Expertise lies in the areas of CEO and executive recruitment, compensation and retention analysis, and HR consulting. For more information, contact our industry experts to experience the gold standard.



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Mitchell Stankovic & Associates (MSA) is a strategic consulting firm specializing in the credit union industry to increase consumer impact and market relevance, and modernize business practices from board governance to CEO and leadership transitions. We are trusted advisors and industry thought leaders who believe that making a difference is our highest priority, demonstrated by our long-term relationships and stellar reputation. The Underground Collision initiative is a brainchild of MSA. The Underground has a simple goal: Create an intimate environment for authentic dialogue, believing that the energy of focused debate will echo beyond the moment and become a catalyst for change. MSA partners volunteer their time, giving back to the industry in the spirit of people who help people.



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OM Financial Group is an independent financial services company with offices located throughout the country. OM pioneered collateral assignment split dollar programs for the credit union industry and continues to specialize in helping credit unions offer competitive and cost-effective Supplemental Executive Retirement Plans (SERPs) which are designed to reward and retain key employees.

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Corporate One FCU is one of the nation's most progressive cooperative corporate credit unions, with more than \$4.6 billion in average assets, serving nearly 800 credit unions nationwide. Corporate One offers comprehensive payments, investments, and funding solutions to help credit unions grow their bottom line. Visit [www.corporateone.coop](http://www.corporateone.coop) for more information.



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MeridianLink Inc., developer of the industry's first multi-channel account opening and loan origination platform, is a leading provider of enterprise business solutions for financial service organizations. The company's passion for excellence is reflected in its web-based credit reporting, lending, and new account opening/deposit technologies, which all enjoy solid reputations as being cutting edge, reliable, and affordable. Based in Costa Mesa, CA, MeridianLink is committed to creating smart solutions that deliver real value.



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Information is a powerful thing. And the right information – analyzed by experienced people – can help all of us learn from the past, navigate the present, and predict the future. That's why at TransUnion we go beyond credit data to offer the insights businesses and consumers need to make informed decisions and achieve great things.





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TruHome Solutions is an award-winning mortgage CUSO that exercises transparency in every detail, recommending tailored, effective solutions based on each partners' specific needs. Built by approachable, knowledgeable, and service-minded professionals, TruHome seeks to deliver "Real. Simple. Service." to credit union partners and their members – every time.

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Blend is a Silicon Valley company that builds transformative technology for lenders. Blend's white-labeled platform delivers an intuitive application experience for borrowers, creating delight through advanced design and connectivity to consumer financial data. Downstream efficiencies for lenders are realized via machine learning and sophisticated architecture, while open APIs and off-the-shelf integrations to key origination systems make implementation fast and economically viable for lenders of all sizes. Blend's platform processed more than \$1 billion in applications daily in 2018.



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rateGenius is a multi-state, web-based loan brokerage company. By hosting a virtual marketplace, rateGenius brings together qualified borrowers and competitive lenders to create the best possible financing opportunity.

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Headquartered in San Antonio, TX, SWBC is a diversified financial services company providing a wide range of insurance, mortgage, and investment services to financial institutions, businesses, and individuals. With more than 2,800 employees and offices across the country, SWBC is committed to providing quality products, outstanding service, and customized solutions in all 50 states.

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CU Direct helps credit unions increase lending, create efficiencies, and grow membership through its end-to-end enterprise origination solutions. CU Direct can improve your loan process with our extensive suite of products designed to provide a unified lending experience. For more information, visit [www.cudirect.com](http://www.cudirect.com).



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Credit Union Leasing of America (CULA) has been the leader in indirect vehicle leasing for credit unions for more than 30 years. Founded in 1988, CULA provides best-in-class program assistance, analytics reporting, compliance support, dealer management tools, and member services. The CULA indirect vehicle leasing program empowers credit union innovators to diversify their existing loan portfolios, improve yield, and expand member services.



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Q2 is a financial experience company headquartered in Austin, TX. Driven by a mission to build stronger communities by strengthening the financial institutions that serve them, we empower banks, credit unions, and other financial services providers to be an ever-present companion on an accountholder's financial journey. Combining industry-leading features, integrations, and operations capabilities with data-driven insights, open technology, and a unique problem-solving process to drive emotions and outcomes, Q2 helps our customers unlock new opportunities, grow faster, and improve efficiencies. Learn more about Q2 at [www.q2ebanking.com](http://www.q2ebanking.com).



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National Cooperative Bank (NCB) is a leading provider of banking products and services to cooperative enterprises across the United States. Given our shared cooperative roots, credit unions and NCB have had a mutually beneficial relationship since NCB's inception. We currently work with more than 800 credit unions, leagues, and CUSOs nationwide offering competitive deposit, cash management, and correspondent banking services.

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Stifel is working with credit unions across the United States, providing financial services related to fixed income investing, loan sales, asset liability management, funding, and regulatory support. More information can be found at [www.stifel.com](http://www.stifel.com).

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TruHome Solutions is an award-winning mortgage CUSO that exercises transparency in every detail, recommending tailored, effective solutions based on each partners' specific needs. Built by approachable, knowledgeable, and service-minded professionals, TruHome seeks to deliver "Real. Simple. Service." to credit union partners and their members – every time.

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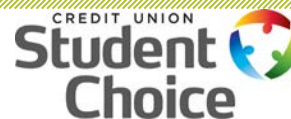
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CU Solutions Group is a credit union service organization serving the credit union industry through enhanced technology, marketing, performance solutions and strategic advisory services. The organization is dedicated to helping its 3,400 credit union clients serve, grow and build financial strength. Learn more at [CUSolutionsGroup.com](http://CUSolutionsGroup.com).

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As a service bureau owned by credit unions, and serving only credit unions, Synergent has provided comprehensive solutions through the synergy of its divisions since 1971. A subsidiary of the Maine Credit Union League, Synergent provides credit unions with core processing via the industry-leading Symitar Episys platform, best-of-breed add-on products, and payment services, as well as direct marketing services, dedicated to helping credit unions develop deeper member relationships through targeted communications.

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IWS is a leading provider of VSA/MBI protection and GAP to credit unions nationwide. IWS provides vehicle protection solutions and peace of mind for credit union members that go above and beyond products to include world class service after the sale. The company's proven success in the industry is based on its value-based training program which educates credit union managers and staff on performance improvement as well as product knowledge.

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Set in the picturesque town of Middlebury, VT, eDOC Innovations is a nationwide leader in mobile enterprise digital transaction management (mDTM) software. For more than 25 years, eDOC Innovations has been designing easy to use solutions for credit unions that reduce overhead, increase operational efficiency, automate and manage workflow to eliminate paper processes, and provide mobile conveniences for their members. eDOC Innovations' leading solutions, eDocLogic Suite, CheckLogic Suite, and eDOCSignature, seamlessly integrate with existing applications to remove friction in digital transactions and can be deployed on premise or in software as a service (SaaS) model. eDOC products include solutions for remote mobile and in-branch closings, mobile eSigning, digital asset lifecycle management, intelligent and interactive form automation, remote deposit capture, electronic statements, and more.



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CU\*Answers offers expertise in implementing technical solutions to operational needs, and is a leader in helping credit unions form strategic alliances and partnerships. CU\*Answers provides a wide variety of services for credit unions including its flagship CU\*BASE processing system (online and in-house) and Internet development services featuring It's Me 247 online and mobile banking. Additional services include document imaging solutions, web development, and network design and security. Founded more than 45 years ago, CU\*Answers is a 100% credit union-owned cooperative CUSO providing services to all credit unions.



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The Datawatch Data Intelligence platform empowers credit unions large and small to harness the power of automated data preparation and predictive analytics. Analysts, data scientists, and business users at more than 800 credit unions rely on Datawatch to enable data access, automate reconciliation, streamline data migration and reporting during mergers, complete regulatory reporting, create credit risk scorecards, optimize collections, prevent member churn, and gain powerful insights from marketing analytics.



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MDT hosts the Episys core platform from Symitar to provide credit unions with a private cloud alternative for core processing and IT needs. The CUSO's service-first, hybrid approach to outsourcing enables credit unions to boost efficiencies and security and reduce costs while maintaining a high level of control.



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At Sharetec, we develop core processing solutions with two goals: make it smarter and keep it simple. Our system is scalable to meet the needs of credit unions of every size — all while providing a user interface that greatly reduces training time and the need for day-to-day support. Most importantly, we are committed to delivering excellent ROI and lower cost of ownership so you can stay on the cutting edge of technology without cutting into your bottom line.



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As a service bureau owned by credit unions, and serving only credit unions, Synergent has provided comprehensive solutions through the synergy of its divisions since 1971. A subsidiary of the Maine Credit Union League, Synergent provides credit unions with core processing via the industry-leading Symitar Episys platform, best-of-breed add-on products, and payment services, as well as direct marketing services dedicated to helping credit unions develop deeper member relationships through targeted communications.

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Alacriti is a fintech company specializing in payments. Businesses of every size can accept payments and initiate payouts through our secure, cloud-based platform. Our technology supports electronic bill presentment and payments (EBPP) and digital disbursements, enabling our clients to get paid faster, reduce costs, and deliver innovative payment experiences to their customers. We offer payment solutions and provide software, services, and technology outsourcing for our clients. Our technology serves the needs of diverse organizations including financial institutions, healthcare providers, insurance companies, and utilities.



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Blend is a Silicon Valley company that builds transformative technology for lenders. Blend's white-labeled platform delivers an intuitive application experience for borrowers, creating delight through advanced design and connectivity to consumer financial data. Downstream efficiencies for lenders are realized via machine learning and sophisticated architecture, while open APIs and off-the-shelf integrations to key origination systems make implementation fast and economically viable for lenders of all sizes. Blend's platform processed more than \$1 billion in applications daily in 2018.



BAFS

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CU Direct helps credit unions increase lending, create efficiencies, and grow membership through its end-to-end enterprise origination solutions. CU Direct can improve your loan process with our extensive suite of products designed to provide a unified lending experience. For more information, visit [www.cudirect.com](http://www.cudirect.com).





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Alacriti is a fintech company specializing in payments. Businesses of every size can accept payments and initiate payouts through our secure, cloud-based platform. Our technology supports electronic bill presentment and payments (EBPP) and digital disbursements, enabling our clients to get paid faster, reduce costs, and deliver innovative payment experiences to their customers. We offer payment solutions and provide software, services, and technology outsourcing for our clients. Our technology serves the needs of diverse organizations including financial institutions, healthcare providers, insurance companies, and utilities.



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With more than 175 associates and offices in Ohio, Indiana, and New York, GBQ provides proactive audit, compliance, IT, and management consulting services to the credit union industry. We have a team of professionals that exclusively serves credit unions, offering a diversity of expertise, background, and education to our clients. At GBQ we empower the growth of our credit union clients.

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Founded in 1978, EasCorp, together with its subsidiary Vertifi Software, ensures that its credit union members have access to cutting-edge, value-added services that not only meet, but also exceed their expectations, including deposit, loan, and investment services, ALM services, ACH processing, RDC solutions, cash management services, and statement rendering.

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Alloya provides critical cooperative services to more than 1,600 member credit unions, including investment, financial, lending, and correspondent services. In conjunction with its wholly owned CUSO, Balance Sheet Solutions LLC, Alloya leverages the power of aggregation to ensure its members remain competitive in today's marketplace. To learn more, visit [www.alloyacorp.org](http://www.alloyacorp.org).



## CORPORATE AMERICA CREDIT UNION

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[www.corpam.org](http://www.corpam.org)

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Chief Innovation Officer

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Corporate America Credit Union serves nearly 500 credit unions across the nation and seeks to add value to member credit unions by providing access to a comprehensive list of products and services including investments, liquidity solutions, and correspondent services such as ACH, item processing, and remote deposit capture. Our priority is serving the needs of our member-owners to help ensure their future success. For more information, call (800) 292-6242 or visit [www.corpam.org](http://www.corpam.org).

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Corporate Central Credit Union is a federally insured corporate credit union that partners to provide innovative correspondent and transactional products, investment services, liquidity and lending programs with unparalleled commitment to its members. Corporate Central has been servicing more than 350 credit unions and organizations throughout the United States since 1947.



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National Cooperative Bank (NCB) is a leading provider of banking products and services to cooperative enterprises across the United States. Given our shared cooperative roots, credit unions and NCB have had a mutually beneficial relationship since NCB's inception. We currently work with more than 800 credit unions, leagues, and CUSOs nationwide offering competitive deposit, cash management, and correspondent banking services.



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CU Strategic Planning works with credit unions that embrace their cooperative roots. We like to think of ourselves as a full-service strategy lab, helping credit unions realize their full potential—often by embracing a community development-oriented business model. Our services often start with strategic planning, can include research, development, and grant writing and run the gambit through the implementation of projects designed to expand services to members.

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Credit Union Investment Strategy Group of Oppenheimer & Co. Inc. is an institutional fixed income consulting group helping credit unions throughout the country address the unique needs of their investment portfolios. At Oppenheimer, we understand that – which is why we developed services that are tailored specifically for credit unions. Our investment strategies and educational programs are ideal for any credit union that wants to try to get more out of its investment portfolio and take its investment knowledge to the next level. Contact us to see what we can do for your credit union.



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Stifel is working with credit unions across the United States, providing financial services related to fixed income investing, loan sales, asset liability management, funding, and regulatory support. More information can be found at [www.stifel.com](http://www.stifel.com).

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Jay Johnson

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The League of Southeastern Credit Unions & Affiliates represents 242 credit unions in Alabama and Florida with a combined total of \$89 billion in assets and more than 7.9 million members. LSCU provides advocacy and regulatory information, education and training, cooperative initiatives (including financial education outreach), media relations and information, and business solutions.



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### MOUNTAIN WEST CREDIT UNION ASSOCIATION

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[www.mwcua.com](http://www.mwcua.com)

Scott Earl

President/CEO

Mountain West Credit Union Association is a state trade association for credit unions in Arizona, Colorado, and Wyoming. The association advocates for credit unions through its government and regulatory relations activities and provides its affiliated credit unions' staff members professional training and development, as well as compliance and operational assistance.

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DDJ Myers enhances the strategic execution capabilities of clients nationwide, including community banks, credit unions, insurance organizations, and non-profits. The seasoned team of facilitators are known as industry thought leaders and are sought after to speak at conferences nationwide on a variety of topics, including board dynamics, management alignment, transformative culture change, as well as developing mid-level talent to be the champions and protagonists of change. Founded in the '80s as an executive search firm, DDJ Myers has been supporting high-performing organizations for more than 30 years with their executive development, succession planning, and strategic planning services.



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Lending Solutions Consulting Inc. (LSCI) is the industry leader in providing training and consulting services to credit unions across North America. Rex Johnson founded the University of Lending, a comprehensive five-day lending school in 1996. He and his team of experts have since trained over 50,000 credit union employees, helping credit unions achieve dramatic improvements in their loan yields, ROAs, and member service practices. In addition to the University of Lending, LSCI offers onsite consulting, portfolio analysis, and our newest service; Smart Loan Audit.



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Mitchell Stankovic & Associates (MSA) is a strategic consulting firm specializing in the credit union industry to increase consumer impact and market relevance, and modernize business practices from board governance to CEO and leadership transitions. We are trusted advisors and industry thought leaders who believe that making a difference is our highest priority, demonstrated by our long-term relationships and stellar reputation. The Underground Collision initiative is a brainchild of MSA. The Underground has a simple goal: Create an intimate environment for authentic dialogue, believing that the energy of focused debate will echo beyond the moment and become a catalyst for change. MSA partners volunteer their time, giving back to the industry in the spirit of people who help people.



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O'Rourke & Associates offers a wide range of executive search services nationwide exclusively to the credit union industry. Expertise lies in the areas of CEO and executive recruitment, compensation and retention analysis, and HR consulting. For more information, contact our industry experts to experience the gold standard.

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## 2019 CALENDAR OF EVENTS

### Analytics

FEBRUARY 12-13: *Phoenix*

OCTOBER 1-2: *Charlotte*

### CEO

MARCH 10: *Washington, DC*

### CFO

JUNE 17-18: *Washington, DC*

OCTOBER 21-22: *San Diego*

### CLO

FEBRUARY 11-12: *Phoenix*

JULY 23-24: *Minneapolis*

### Consumer Lending

JUNE 18-19: *Washington, DC*

### Contact Centers

MAY 6-7: *Chicago*

### Cybersecurity

APRIL 16-17: *Charlotte*

### Digital Marketing

MAY 7-8: *Chicago*

### HR

MARCH 25-26: *Atlanta*

OCTOBER 22-23: *San Diego*

### Foundations

SEPTEMBER 17-18: *Washington, DC*

### Marketing

SEPTEMBER 16-17: *Washington, DC*

### Member Experience

MARCH 26-27: *Atlanta*

### Retail

JULY 24-25: *Minneapolis*

### Risk

MAY 27-28: *Charlotte*

### Technology

APRIL 15-16: *Charlotte*



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