

Solving the GROWTH PUZZLE



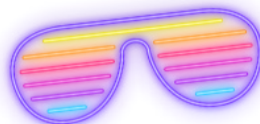
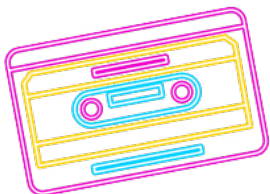
VISIFI CUSTOMER CONFERENCE 2024
OCTOBER 22-25 | CHATTANOOGA, TN
CHATTANOOGA MARRIOTT DOWNTOWN

Schedule

Day 1, Tuesday October 22

Chattanooga Marriott Downtown - Onsite Registration and Welcome Reception

Time	Session
9:00 AM	Golf (Optional)
12:00 PM - 5:00 PM	Conference Check In
5:30 PM	Totally Tubular "Back to the 80s" Welcome Reception: Dust off your leg warmers and break out the neon! Join us for a night of radical fun and retro surprises as we celebrate the iconic decade of the 80s! We're talking big hair, shoulder pads, and all the neon you can handle. Come dressed in your best 80s attire and dance the night away with our favorite DJ.





Day 2, Wednesday October 23

Personalized Services, Member Experience, & Digital Transformation Strategies to Drive Growth and Competitiveness

Time	Session
8:00 AM - 9:00 AM	Remaining Registrations & Breakfast
9:00 AM - 10:15 AM	Opening Remarks: Solving the Growth Puzzle <ul style="list-style-type: none">• Moderator: Bryan Clagett• VisiFI kick off Vision: Robin Kolvek• Deda Vision: Marcello DeAngelis
10:15 AM - 10:45 AM	Networking Break/Sponsor Intro
10:45 AM - 11:15 AM	Peer Collaboration
11:20 AM - 12:00 PM	VisiFI Product Evolution - Co-Creating the Future for Growth <i>Jami Jennings and Katie Brackett</i> Ready. Set. Grow. Learn how we are co-creating solutions that meet the demands of today while preparing for the challenges of tomorrow.
12:00 PM - 1:00 PM	Lunch
12:20PM - 12:45 PM	Sponsored Speaker SavvyMoney
1:00 PM - 1:45 PM	Experience is Everything - <i>Katie Brackett</i>
2:00 PM - 2:45 PM	Strategic Member Engagement: A New Era of Value Creation <i>Bob Meara and Jami Jennings</i> Engagement has emerged as a critical focus for credit unions seeking to reinforce their value in the eyes of their members. While CUs may excel in creating strong first impressions through branch visits or competitive loan rates, these isolated interactions need consistent reinforcement to foster long-term loyalty and trust. This panel will explore the concept of “member engagement,” particularly in the digital realm, and discuss why it is essential for sustainable growth.
2:45 PM - 3:15 PM	Networking Break
3:15 PM - 4:30 PM	Breakout Session A - CyberSecurity Breakout Session B - Member Journey Breakout Session C - Financial Literacy Breakout Session D - Coming Soon
4:15 PM	Day 2 Wrap Up
5:00 - 5:30 PM	Transportation to Offsite
6:00 PM	Customer Celebration and Appreciation Dinner - Southern Belle Dinner Cruise Enough about us, it's our turn to celebrate you and all your accomplishments. Network with our credit union leaders and share best practices on a fun, offsite outing.

Day 3, Thursday October 24

Cybersecurity, Regulatory Compliance, AI, Roadmap

Time	Session
7:30 AM - 8:30 AM	Executive Breakfast - Invitation Only CEO - Hosted by Robin Kolvek
8:00 AM - 9:00 AM	Breakfast & Networking
9:00 AM - 9:15 AM	Day 3 Kick Off - <i>Bryan Clagett</i>
9:15 AM - 9:50 AM	<p>So Many Scams, So Little Time - <i>Joseph Kirkpatrick - KirkpatrickPrice</i></p> <p>Protecting your members, systems and data remains a top priority, with 67% of credit unions reporting instances of unauthorized access to data or networks and almost 100% report fraud. Enhancing cybersecurity measures and ensuring compliance with regulatory requirements are essential for maintaining trust and security.</p> <ul style="list-style-type: none"> • Importance of security and compliance in sustainable growth • Connecting security with efficiency and member trust
9:50 AM - 10:00 AM	Networking Break & Partner Meetup
10:00 AM - 10:45 AM	<p>Advocacy and Regulatory Landscape - Ask the Auditor <i>Kerri Donald - Peach State Credit Union and Brian Clagett</i></p> <p>The merger of CUNA and NAFCU to form America's Credit Unions has significant implications for advocacy work. The industry is navigating the effects of this merger while striving for a unified voice to better represent credit union interests in the regulatory landscape. Open mic.</p>
11:00 AM - 12:00 PM	<p>Roadmap Session: Core Banking and Ancillary Solutions <i>Katie Brackett and Mario Ignazzito</i></p>
12:00 PM - 1:00 PM	Lunch
12:30 PM - 12:50 PM	Sponsored by Pidgen & Corporate America
1:00 PM - 1:30 PM	<p>Core Continued - Ancillary Solutions <i>Ancillary Solutions Team</i></p>
1:30 PM - 3:00 PM	<p>Roadmap Session: Digital Banking, Ancillary Solutions <i>Jami Jennings and Mario Ignazzito</i></p>
3:00 PM - 3:15 PM	Networking Break
3:15 PM - 3:45 PM	<p>Leveraging AI for Personalized Member Experience <i>Blesson Abraham, AviaryAI</i></p> <p>Credit unions are increasingly leveraging AI for various functions, including credit decisioning and customer service. However, there are concerns about AI systems potentially misleading consumers or violating compliance legislation. This underscores the need for cautious and balanced implementation of AI technologies.</p>
4:00 PM	Day 3 Wrap Up
	Night On Your Own

Day 4, Friday October 25

Community Impact, Data, Growth

Time	Session
8:00 AM - 9:00 AM	Breakfast & Networking
9:00 AM - 10:00 AM	Data as a Growth Driver <i>Erin Cartland and Stefano Moretti</i> Understanding the data we have and the best practices strategies to build actionable insights that result in growth opportunities.
10:00 AM - 10:45 AM	Next Gen Technology and Digital Transformation <i>Roberto Endrizzi and Jami Jennings</i>
11:00 AM - 11:45 PM	Putting it all Together to Drive Growth
11:45 AM - 12:00 PM	Closing Remarks

**Sessions and speakers are subject to change.*

