

Solving the GROWTH PUZZLE



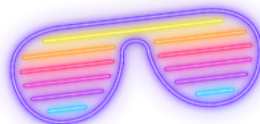
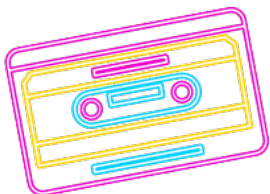
VISIFI CUSTOMER CONFERENCE 2024
OCTOBER 22-25 | CHATTANOOGA, TN
CHATTANOOGA MARRIOTT DOWNTOWN

Schedule

Day 1, Tuesday October 22

Chattanooga Marriott Downtown - Onsite Registration and Welcome Reception

| Time | Session |
|--------------------|---|
| 9:00 AM | Golf (Optional) |
| 12:00 PM - 4:00 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 De Angelis |
| 10:15 AM - 10:45 AM | Introductions |
| 10:45 AM - 11:15 AM | Networking Break/Sponsor Intro |
| 11:15 AM - 11:45 AM | 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. |
| 11:45 AM - 1:00 PM | Lunch |
| 12:15 PM - 12:40 PM | Sponsor Speaker - SavvyMoney |
| 1:00 PM - 1:30 PM | Experience is Everything <i>Katie Brackett</i> Review of the latest i-POWER® user experience enhancements |
| 1:45 PM - 2:30 PM | Strategic Member Engagement: A New Era of Value Creation <i>Bob Meara</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. |
| 2:30 PM - 2:45 PM | Networking Break |
| 3:00 PM - 4:15 PM | Breakout Session A: Financial Behavior Workshop with Cara Macksoud, CEO of Money Habitudes. During the financial behavior workshop, participants will explore their thoughts, attitudes, and behaviors related to money and gain insight into how these behaviors influence their financial decisions Breakout Session B: Digital Loan Servicing: Increase Income and Retain Members as Rates Drop with Catherine York Powers, CEO of Constant - This session will explore how digitizing loan operations and shifting workflows to online banking can boost NII and keep members from being lured away by low-rate refinance offers. Breakout Session C: Proven AI for a Thriving Lending Ecosystem with Aaron Long, Head of Client Strategy & Advisory, Zest.AI - In this breakout we will discuss the current credit challenges CUs face in this economic climate, how CUs can reduce risk, and increase automation for a better member experience with AI, how to combat application fraud with AI Breakout Session D: Integrating for the Future with Katrina Beery, Industry Partnerships Manager, Velera |
| 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 - 9:00 AM | Executive Breakfast - Invitation Only - Hosted by Robin Kolvek |
| 8:00 AM - 9:00 AM | Breakfast & Networking |
| 9:00 AM - 9:15 AM | Day 3 Kick Off - Bryan Clagett |
| 9:15 AM - 9:50 AM | So Many Scams, So Little Time <i>Joseph Kirkpatrick - KirkpatrickPrice</i> 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. <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 | Advocacy and Regulatory Landscape - Ask the Auditor <i>Kerri Donald - Peach State Federal Credit Union</i> We will dive into critical regulatory concerns impacting credit unions of all sizes, with insights on federal and state-level trends. Highlighting fees, disclosures, Reg CC, and more. Come ready with questions and learn how to prepare and protect your credit union. |
| 11:00 AM - 12:00 PM | Roadmap Session: i-POWER® Ancillary Solutions <i>Core Product Team</i> |
| 12:00 PM - 1:00 PM | Lunch |
| 12:30 PM - 12:50 PM | Sponsor Speaker - Corporate America & Pidgin Joint Session |
| 1:00 PM - 1:30 PM | Roadmap Session Continued - i-POWER® & Third Parties <i>Core Product Team</i> |
| 1:30 PM - 3:00 PM | Roadmap Session: Digital Banking, Ancillary Solutions <i>Jami Jennings</i> |
| 3:00 PM - 3:15 PM | Networking Break |
| 3:15 PM - 3:45 PM | Leveraging AI for Personalized Member Experience <i>Blesson Abraham, AviaryAI</i> 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. |
| 4:00 PM | Day 3 Wrap Up |

Night On Your Own

Day 4, Friday October 25

Digital Transformation & Driving Growth with Data

| Time | Session |
|---------------------|--|
| 8:00 AM - 9:00 AM | Breakfast & Networking |
| 9:00 AM - 9:30 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. |
| 9:45 AM - 10:15 AM | Next Gen Technology and Digital Transformation <i>Roberto Endrizzi and Jami Jennings</i> |
| 10:30 AM - 10:45 AM | Networking Break |
| 10:45 AM - 11:30 AM | Putting it all Together - Buy, Invest, Partner and Build for Growth <i>Gary Young</i> |
| 11:30 AM - 12:00 PM | Closing Remarks |

**Sessions and speakers are subject to change.*

