

# SOUTHEAST **DIRECTORS'** CONFERENCE

A PROUD PAST AND A POWERFUL FUTURE

JUNE 28–JULY 1 • POINT CLEAR, AL

**100**  
*years of*  
*credit union volunteers*

*brought to you by...*

ALABAMA CREDIT UNION LEAGUE  
FLORIDA CREDIT UNION LEAGUE  
GEORGIA CREDIT UNION AFFILIATES  
KENTUCKY CREDIT UNION LEAGUE & AFFILIATES  
LOUISIANA CREDIT UNION LEAGUE  
MISSISSIPPI CREDIT UNION ASSOCIATION  
NORTH CAROLINA CREDIT UNION LEAGUE  
SOUTH CAROLINA CREDIT UNION LEAGUE & AFFILIATES  
TENNESSEE CREDIT UNION LEAGUE  
VIRGINIA CREDIT UNION LEAGUE

**SRCUS**  
Southeastern Regional Credit Union Schools

  
**CUNA**

Credit Union  
National Association

# 100 *years of* *credit union volunteers*

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VIRGINIA CREDIT UNION LEAGUE

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## **A PROUD PAST AND A POWERFUL FUTURE**

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For a century now, credit union volunteers have been leading their members toward financial freedom. They've built a proud past and now's your time to create a powerful future. Help the efforts of those that built our credit union movement become something more powerful than they ever could have imagined. Learn to lead your credit union successfully, get the latest compliance updates, and gain advice on how to thrive in today's economic conditions. Don't miss this opportunity to shape the future of America's credit unions.

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### *who should attend?*

This conference is offered to credit union Directors and Committee members of state League-affiliated credit unions. The Southeast Directors' Conference is conducted by the State Credit Union Leagues of Alabama, Georgia, Florida, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, and Virginia.

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## FEATURED SPEAKERS

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*thomas hudgin* formed his own company, Wilmington Quality Associates in 1991. Thomas specializes in successful business management. His focus is helping companies improve competitive performance by teaching effective leadership skills, improving company image, having highly motivated employees and creating delighted customers.



*steve rick* is the Senior Economist for CUNA's Economics & Statistics Department. Steve has been with CUNA since January, 1992. He conducts economic research, teaches and lectures at various credit union schools and conferences across the country and internationally, and writes articles for CUNA publications.



*ed robinson* transforms individuals into professionals, managers into leaders and leaders to Rainmakers. A former CPA, Ed is the the author of three books and an expert in practice growth. His energetic, engaging and entertaining style is only one reason why Ed's strategies improve performance, helping individuals manage change and increase revenue regardless of economic times and challenges.



*rob rutkowski* is a Partner in the Brooklyn Heights, Ohio office of Weltman, Weinberg & Reis Co., L.P.A. (WWR) and manages the firm's Credit Union Department and the Corporate & Financial Services practice group. Rob is a frequent lecturer on legal issues for credit unions and has served as a speaker for the Credit Union National Association (CUNA), the National Association of Federal Credit Unions (NAFCU) and most recently, the Credit Union Executives Society (CUES), where he led a series of informational webinars.



*marcia sarrazin* is the Associate Regional Director of Operations for Region 3 of the National Credit Union Administration. She has held that position since April 2005. In that capacity she manages the Office staff of the region. Marcia began her career with the National Credit Union Administration in 1980 as a cooperative education student from Northeastern University in Boston, Massachusetts. Her examiner duty stations were in New Jersey and Connecticut. She was a Regional Insurance Director in New York; a Supervisory Examiner in Rhode Island; and Supervision Director in the Office of Examination and Insurance prior to her current position.



*mark sieewright* is the Corporate Senior Vice President of Fiserv, Inc. He is a highly sought keynote speaker and strategic adviser within the financial services industry. During the past 10 years, Mark has spoken at more than 200 financial services events and conferences around the world, and worked with dozens of financial institutions to improve their business performance and market share.

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## EVENT DESCRIPTIONS

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### **Pre-Conference Workshop: ALM for Directors**

*Steve Rick*

Take a guided tour through asset liability management and economic issues for credit unions. Practice making decisions for your credit union based on different scenarios that are affected by the economic trends.

### **Powerful Leadership Practices for Today's Credit Unions: Going Beyond Survival Through Effective Visionary Planning**

*Thomas Hudgin*

Success means setting realistic short term and long term business goals. This presentation will provide you with the tools to develop a winning strategy of leadership practices that work as a guideline for a strategic plan that can be implemented to enhance your credit union's success in a timely manner.

### **Today's Economy and the Risks for Your Credit Union**

*Steve Rick*

Hear from one of CUNA's senior economists about the state of the economy and trends that will affect your credit union. How will these changes and forecasts affect our credit union's risk assessment and management strategies?

### **The Mortgage Market: Where Do We Go From Here?**

*Steve Rick*

The subprime mortgage issues of the past couple of years have taken their toll on the economy as a whole, not to mention the mortgage market. In this session, find out more about what your credit union can do to serve its members, and potentially find some opportunities to benefit from the mistakes of banks and other financial services industries.

### **Compliance Update**

*Rob Rutkowski*

Issues such as Share Insurance changes, Red Flag requirements, ID theft, and the banking industry's crumbling have created a moving target for compliance. This session will help you to keep up with the issues, so that you can keep your shop in order.

### **NCUA Update**

*Marcia Sarrazin*

Hear from an NCUA official about current administration priorities and hot-button issues. The financial services sector has gone through significant turmoil recently and this is an opportunity to hear directly from the regulators what is going on and how that may affect your organization.

### **Growth Strategies**

*Mark Sievwright*

Credit union growth is one of the key issues that we face as an industry as our members age. Here we'll take a look at different growth strategies credit unions have implemented for growing assets, loans, and members.

### **CEO Landscape**

*Gene Mandarino*

Do you know how many credit union CEOs are set to retire in the next five years? You'd better! Find out what the situation is for the credit union industry so that you can create effective succession plans, develop talent, and position your organization to remain a strong player in changing times.

### **CEO Oversight**

*Gene Mandarino*

The board has only one employee, a very high profile employee, the CEO. As such, the board's role in overseeing the CEO is one critical to the mission and objectives of the credit union.

### **Change Management: From Fighting the Storm to Dancing in the Rain™**

*Ed Robinson*

Are the professionals in your industry being challenged by new ways of doing business, industry or regulatory changes? Ed shares core, universal strategies to dance and thrive through all the storms in your life, echoing his key philosophy that you can't wait for the storms to stop, you've got to learn how to dance in the rain.

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## GUEST PROGRAM DESCRIPTIONS

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### **Cooking Class and Lunch**

The Grand Hotel Executive Chef will conduct a fun and educational cooking class. When he is done, you will actually get to eat the finished product. You will receive an educational cooking class, lunch, recipes, a Grand Hotel Cooking Academy diploma, and not to mention have a great time.

### **Candle Making with Fairhope Soy Candle Company**

Join the ladies from the Fairhope Soy Candle Company. You can learn the candle making process and make your own custom 2 oz travel candle.

### **Grounds Tour**

Conducted by the resorts Expert Gardener, you will learn about the beautifully manicured grounds of the Grand Hotel Marriott.

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## SCHEDULE

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### Sunday, June 28

12:00–5:00 p.m.	Registration
1:00–4:00 p.m.	Pre-Conference Workshop: ALM for Directors <i>(pre-registration not necessary for this workshop)</i>
6:00–8:00 p.m.	Reception

### Monday, June 29

7:45–8:45 a.m.	Breakfast
8:45–10:15 a.m.	Powerful Leadership Practices for Today's Credit Unions: Going Beyond Survival Through Effective Visionary Planning
10:30–11:45 a.m.	Today's Economy and the Risks for Your Credit Union
10:00 a.m.–1:00 p.m.	<i>Guest Options (included in price of guest fee. Pre-registration required)</i> A. Cooking Class B. Candle Making with Fairhope Soy Candle Company
11:45 a.m.–1:00 p.m.	Lunch
1:00–2:15 p.m.	The Mortgage Market: Where Do We Go From Here?
2:30–3:45 p.m.	Compliance Update

### Tuesday, June 30

7:45–8:45 a.m.	Breakfast
8:45–9:45 a.m.	NCUA Update
10:00 a.m.–12:00 p.m.	Growth Strategies
<i>Tuesday afternoon:</i>	<i>Optional Events Available for Participants and Guests</i>
6:30–9:00 p.m.	Banquet and Entertainment

### Wednesday, July 1

7:45–8:45 a.m.	Breakfast
9:00–10:00 a.m.	<i>Guest Option: Grounds Tour</i>
8:45–10:15 a.m.	CEO Landscape
10:30 a.m.–12:00 p.m.	CEO Oversight
12:00–2:00 p.m.	Group Lunch and Closing General Session <i>(available to participants and registered guests)</i> Change Management: From Fighting the Storm to Dancing in the Rain™
2:00 p.m.	Adjourn

*register today!*

Visit [training.gcu.org](http://training.gcu.org) and choose *Event Calendar*.

For assistance, e-mail [reginfo@cuna.coop](mailto:reginfo@cuna.coop) or call 800-356-9655, ext. 4400.

## REGISTRATION & HOTEL INFORMATION

### Location

Grand Hotel Marriott  
One Grand Boulevard  
P.O. Box 639  
Point Clear, Alabama 36564  
Phone: (251)928-9201 or (800)544-9933  
<http://www.marriott.com/hotels/travel/ptlal-grand-hotel-marriott-resort-golf-club-and-spa/>  
Room rate: \$189.00 Single/Double

### The hotel cut-off date is June 7.

Please mention CUNA to receive this group rate.

### Airport information

#### Pensacola Regional Airport PNS (65 miles from hotel)

[www.flypensacola.com](http://www.flypensacola.com) • Phone: 1 850 436 5005  
Driving Directions: I-10 West to exit 35. Make a left. Go south on Hwy. 98 (Four Lane) approximately 7 miles to Welcome to Fairhope Sign on right, (Alternate/Scenic Hwy. 98). Proceed ahead to downtown Fairhope. Turn right onto Fairhope Avenue (3rd Traffic Light). Before you get to the Fairhope Municipal Pier, turn left onto Mobile St. (Also Scenic 98). Resort is approximately 3 miles on right.  
Airport shuttle service, reservation required,  
fee: \$75 one way  
Estimated taxi fare: \$140.00 one way

#### Mobile Regional Airport MOB (Approx. 46 miles from hotel)

[www.mobairport.com](http://www.mobairport.com) • Phone: 1 800 357 5373  
Driving Directions: Airport Blvd. East to I-65. I-65 South to I-10 East. I-10 East through tunnel and across Bay Bridge, to Spanish Fort/Daphne/Fairhope Exit #35 (Highway 98). Go south on Hwy. 98 (Four Lane) approximately 7 miles to Welcome to Fairhope Sign on right, (Alternate/Scenic Hwy. 98). Proceed ahead to downtown Fairhope. Turn right onto Fairhope Avenue (3rd Traffic Light). Before you get to the Fairhope Municipal Pier, turn left onto Mobile St. (Also Scenic 98). Resort is approximately 3 miles on right.  
Alternate Transportation : Mobile Bay Transportation  
Airport shuttle service, reservation required,  
fee: \$75 (one way)  
Estimated taxi fare: \$105.00 (one way)

### Golf Outing (includes golf, cart, range balls and box lunch)

The 18-hole course at the Marriott Lakewood Golf Club facility in Point Clear, Alabama features 6,770 yards of golf from the longest tees for a par of 72.

### Tour of Historic Mobile, AL

A tour of the 19th century garden district will take guests back in time. This unique tour gives visitors a first hand look at the lavish lifestyle lived by Mobile's social elite during one of the most romanticized periods of Alabama history.

### USS Alabama Battleship Memorial Park

This mighty WWII Battleship is one of the state's leading tourist attractions. View historical ships and aircraft, including the USS Alabama, the Vietnam River Patrol, the A-12 "Blackbird" Spy Plane, and a P51-D Mustang Redtail. Guests will also want to be sure and visit the inspiring Vietnam and Korean War Memorials also located in the park.

### Tuition

**Conference Rate:** \$725

**Guest Fee:** \$299

*Includes meals, reception, banquet, Monday guest activity, Wednesday guest activity, and the closing general session. Important confirmation and program information will be sent electronically to the attendee/contact e-mail addresses provided.*

### Monday Guest Options

*Included in price of guest fee. Registered guests do need to choose which outings they would like to attend prior to the conference.*

### Tuesday Participant/Guest Options:

*(additional registration and fee required)*

Golf Outing:	\$125
USS Alabama Tour:	\$99
Mobile, AL Tour:	\$99

### Wednesday Guest Options

*Included in price of guest fee. No need to sign up prior to conference*

**Confirmations** If you register online and pay with credit card or ACH, you will receive your registration confirmation within three business days. Please allow up to 10 days if you pay by check.

**Cancellations** received in writing (via fax 608-231-4327) seven or more days before the start of the program are eligible for a refund of the amount paid minus a \$50 administrative fee. No refunds will be granted if cancellation is received six days or less before a program begins. Substitutions are accepted anytime prior to the start of the program at no additional cost. Simply fax event and contact information, listing the new participant and who they will be replacing.

## REGISTRATION TIPS FOR EVENT

Our registration system is all new for 2009 events, so here are some quick tips on how to use the new system. If you need assistance, our registrations staff is here to help. Please call 800-356-9655, ext. 4400 or e-mail [reginfo@cuna.coop](mailto:reginfo@cuna.coop).



**ACH PAYMENTS:** You can select ACH Debit in the online registration form to pay directly out of your account. By selecting ACH Debit rather than Credit Card, you'll keep more dollars within the credit union system. See step-by-step ACH instructions at [http://training.gcu.org/reg\\_ach.html](http://training.gcu.org/reg_ach.html)

# SOUTHEAST DIRECTORS' CONFERENCE

JUNE 28-JULY 1, 2009 • POINT CLEAR, AL

## ATTENDEE INFORMATION

Please complete one form per registrant. Type or print all information. Photocopy for multiple registrations.

Legal Name \_\_\_\_\_

Name Preferred on Badge \_\_\_\_\_

Title \_\_\_\_\_

CU Name \_\_\_\_\_

CU Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

CU Phone Number (\_\_\_\_\_) \_\_\_\_\_ Fax Number (\_\_\_\_\_) \_\_\_\_\_

Attendee E-mail \_\_\_\_\_

(Important attendee/guest confirmation and program information will be sent electronically to the attendee e-mail address. If you would like an additional copy of the confirmation forwarded, please provide the contact email.)

## CONTACT INFORMATION (\*required field)

If CUNA requires more information, whom may we contact? This will help us in processing your registration more quickly.

Name: \_\_\_\_\_

Email: \_\_\_\_\_ Phone (\_\_\_\_\_) \_\_\_\_\_

Are you CUNA/League affiliated?  Yes  No

Please note: Affiliation with CUNA/League is required for attendance, but limited exceptions may apply. Please contact CUNA prior to making travel arrangements to confirm eligibility.

Check here if you have any disability that requires special services. (describe below)

\_\_\_\_\_

In case of emergency, please contact (required):

Day contact name \_\_\_\_\_ Phone (\_\_\_\_\_) \_\_\_\_\_

Night contact name \_\_\_\_\_ Phone (\_\_\_\_\_) \_\_\_\_\_

Completion of this form shall signify authorization to assist the registrant in emergency situations and to use the information on the form, or otherwise provided by registrant, in such situations.

## PAYMENT METHOD (Payment must accompany registration form)

Enclosed is a check, made payable to CUNA, Inc.

Credit card (Fax to 608-231-4327)

Charge \$ \_\_\_\_\_ to my  Visa®  MasterCard®

Card account number \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Expiration date \_\_\_\_\_

Print name as it appears on card \_\_\_\_\_

Signature \_\_\_\_\_

Please ACH debit my account for the amount indicated above as follows:

Depository Name \_\_\_\_\_

ABA # \_\_\_\_\_ (9 digits) Account # \_\_\_\_\_ (no G/L#s)

\*In accordance with NACHA Operating Rules, I authorize CUNA, Inc to initiate a debit entry to the checking account at the depository institution named above for the purpose of collecting registration fees as indicated.

Signed: \_\_\_\_\_ Date \_\_\_\_\_

If you do not receive confirmation within two weeks of registration, please call 800-356-9655, ext. 4400.

## ATTENDEE REGISTRATION

Southeast Directors' Conference **\$725**  
Full Attendee Registration (SRCUSAL09)

Tuesday Participant Options

USS Alabama Tour (SRCUSALT09) **\$99**

Historic Mobile, AL Tour (SRCUSMT09) **\$99**

Golf Outing (SRCUSAG09) **\$125**

Handicap: \_\_\_\_\_

## GUEST REGISTRATION

Please complete one form per registrant. Type or print all information. Photocopy for multiple registrations.

Guests for Southeast Directors' Conference **\$299**  
(SRCUSSAL09)

Guest name \_\_\_\_\_

Name preferred on badge \_\_\_\_\_

Mailing address \_\_\_\_\_

City/State(Province)/Postal \_\_\_\_\_

Address is for  Home  CU

Monday Guest Options

Candle-Making Class

Cooking Class

Tuesday Guest Options

USS Alabama Tour (SRCUSGALT09) **\$99**

Historic Mobile, AL Tour (SRCUSGMT09) **\$99**

Golf Outing (SRCUSGG09) **\$125**

Handicap: \_\_\_\_\_

Total Enclosed \$ \_\_\_\_\_

## MAIL

Credit Union National Association  
PO Box 78546  
Milwaukee, WI 53278-0546

## FAX

608-231-4327

## REGISTER ONLINE

Visit [training.gcu.org](http://training.gcu.org) and choose *Event Calendar*



Credit Union  
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THE POWER OF PARTNERSHIP

PO Box 431 | Madison, WI 53701-0431

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