



Conference Agenda

April 27 – 30, 2026

DAY 1 ● MONDAY, APRIL 27

7:00 AM – 2:00 PM	<p>Golf Event @ Disney’s Palm Golf Course <i>Sponsored by Auto Financial Group and Olden Lane</i></p> <p>8:30 AM Shotgun Start</p>	
10:00 AM – 2:30 PM	Exhibitor Setup	GH Ballroom South
11:00 AM – 6:00 PM	Conference Check-In	Asbury Rotunda
1:30 PM – 2:00 PM	<p>Welcome and Annual Meeting <i>Sponsored by Harness</i></p>	Asbury A-B
2:00 PM – 2:45 PM	<p>CUSO Hot Topics <i>Sponsored by Cloudvirga</i></p> <p>A fan-favorite session every year, we’ll dive into the most pressing issues shaping the industry today. Panelist from Messick Lauer & Smith P.C. will break down key market, regulatory, and legal trends, providing expert insights into the challenges and opportunities ahead.</p> <p>Panel – Brian Lauer, Messick Lauer & Smith P.C. and Team</p>	Asbury A-B
2:45 PM – 3:15 PM	<p>Why a Credit Union Builds a CUSO</p> <p>Discover the story behind Maps’ CUSO journey – why CUSO development became a strategic priority, how opportunities were evaluated, and what it takes to successfully venture beyond a credit union’s core mission. Attendees will gain insight into both the financial and strategic returns achieved, along with candid lessons learned along the way.</p> <p>Presenter – Mark Zook, President/CEO, Maps Credit Union</p>	Asbury A-B
3:15 PM – 3:30 PM	Refreshment Break	Asbury Foyer
3:30 PM – 4:10 PM	<p>Breakout Sessions</p> <p>Asbury A-B <i>Last Year’s Lessons, This Years Solutions</i></p> <p>Attend and learn how a few credit unions adopted unique solutions introduced at last year’s NACUSO Reimagine conference. Discover what solution or technology was adopted, what problems it was intended to solve, and which ones worked according to</p>	Asbury A-B, Asbury C & Asbury D



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plan. These solutions include Conversational AI, fully integrated Customer Service Management Systems, Outsourced Staffing Solutions, and Data Capture solutions to enhance insurance quoting capabilities.

Presenters – [Nick Bloxham](#), Vice President Insurance Services, SELCO Group, Inc.
[Ken Potter](#), Vice President, Sales, InsureOne

Asbury C

Reinventing the Credit Union for the Modern Member: The Future of Membership

Let's begin to reimagine credit union strategies as they relate to the modern-day member. Membership growth continues to plague most credit unions and its time we "reimagine and reinvent" the credit union membership experience; from reframing communication and messaging to creating community narratives that convey member experiences that drive dreams and empower financial freedom. It's time we put our curiosity, ideas and brainstorming to work and follow through executing the strategies to conquer membership growth. Collaboration is key and purpose and intention are necessary. It's time credit unions think differently, act differently and meet people where they are to measure membership from a "belonging" standpoint versus a "numbers" standpoint. We shouldn't continue to sit back on the sidelines as we watch our industry shrink through mergers, lack of strategy, or lack of intentionality - it's time to REINVENT, REIMAGINE and REINVIGORATE our efforts because the future of membership plays here!

Presenter – [Nicol Matthews](#), COO, Innovative Business Solutions

Asbury D

It's Not Me, It's You: Breaking Up with the Vendor Status Quo

Every great relationship deserves an honest conversation – especially the ones that handle your members' money, trust and brand reputation. Too often, credit unions stay with long-standing vendor partners out of comfort, familiarity, or fear of disruption. This interactive session invites C-level leaders to pause, reflect, and ask the fearless questions: Is this partnership still serving our mission and goals, or just our routine?

Presenters – [Emily Jorgenson](#), Director/Operations & Training, Credit Unions First
[James McBride](#), Founder, Let's Go!
[Becky Reed](#), Chief Operating Officer, BankSocial
[Jack Smith](#), CEO/Co-Founder, PureIT Credit Union Services

4:15 PM – 5:00 PM

Breakout Sessions

Asbury A-B, Asbury C & Asbury D

Asbury A-B

BankSocial's AI Test Lab: Hands-on AI Leverage for Credit Unions & CUSOs

Tired of conference breakouts that are just thinly veiled sales pitches? In a world of demanding immediate, tangible value, why spend an hour listening to theory when you could be learning a skill you can use *today* and help your credit union *tomorrow*?

This is not a pitch. This is a working session.



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Leave the decks and high-level claims behind. Bring your laptop and prepare for the most valuable hour you will spend at the NACUSO conference. John Wingate will personally demonstrate the powerful, free, and accessible AI tools that BankSocial CUSO uses daily. Credit unions and CUSO attendees will be guided through a practical, hands-on workshop designed to provide immediate leverage on the information and challenges they encounter every day using the tools you already have access to.

We are flipping the traditional conference model on its head. Our goal is simple: You will leave this session and immediately 10x your capacity without spending a single dime on new software or consulting.

John and team will provide both group and individual guidance to ensure every participant gains mastery of the tools they already have available.

Presenter – [John Wingate](#), Founder/CEO, BankSocial

Asbury C

Case Study: How CUs are Bringing FedNow® Instant Payments to Members

FedNow® is transforming payments for credit unions by enabling secure, real-time transactions 24/7/365. But what does it really take to implement this new payment rail – and what benefits can it deliver in practice?

In this session, we'll explore real-world credit union studies of adopting FedNow®, from technical integration to member-facing use cases and operational impact. You'll hear how instant payments support everything from mobile banking to direct lending, and gain practical insights you can apply to your own institution. We'll also discuss best practices and lessons learned to help credit unions of any size plan their own FedNow journey.

Presenter – [Mark Keeling](#), Sr. Manager/Payments Strategy & Product Innovation, Catalyst

Asbury D

Traditional CUSOs: Still Relevant, Still Strategic

It's been 20 years since a lot of traditional operations-focused CUSOs were formed. And with all the attention these days towards fintechs, payments, etc. one might contemplate the future of these comparatively less sexy CUSOs. This session consists of original CEOs and some new CEOs that speak to how operating CUSOs such as MBL, Insurance, Investment and Mortgage have changed over the years, how credit unions view and partner with them, what it takes to succeed and how these CUSOs still may be the industry's most exciting superpower.

Presenters – [Bill Beardsley](#), President, Michigan Business Connection, LC
[Nick Bloxham](#), Vice President Insurance Services, SELCO Group, Inc.
[Adrian Dominguez](#), President/CEO, FocusOne
[Ken Lako](#), President/CEO, Members Trust Company
[Keith Reed](#), President/CEO, Cooperative Business Services (CBS)

5:30 PM – 7:00 PM

Welcome Reception @ Disney's Shipwreck Beach



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DAY 2 ● TUESDAY, APRIL 28

7:00 AM – 8:30 AM	Breakfast	Porte Cochere & GH Ballroom S.
8:30 AM – 9:00 AM	NACUSO Welcome Message Randy Salser , NACUSO President/CEO	GH Ballroom North
9:00 AM – 10:00 AM	Keynote Trent Gillespie , CEO, Stellis AI <i>Unleash the AI Flywheel: Leverage AI and Amazon’s Principles to Win the AI Era</i> <p>Discover Amazon’s systematic approach to innovation through a roadmap for any company looking to drive breakthrough ideas and sustained growth. Gain a deep understanding of Amazon’s ‘Working Backwards’ methodology, its leadership principles, and decision-making strategies that fuel continuous innovation.</p> <p>For 30 years, Amazon has set the gold standard for innovation, reshaping industries and redefining how we live and work. Through this leadership in global expansion and major innovation programs, Trent had a front-row seat to Amazon’s groundbreaking strategies. He witnessed how Amazon thought big, made bold decisions, and built a system for continuous innovation.</p>	
10:00 AM – 10:30 AM	Refreshment Break	GH Ballroom South
10:30 AM – 11:30 AM	Advocacy in Action: Navigating the Regulatory & Legislative Landscape Sponsored by Doeren Mayhew <p>Credit unions and CUSOs are operating in an increasingly complex regulatory and legislative environment—where policy decisions can directly shape innovation, investment, and long-term growth. This timely panel brings together industry leaders to break down the issues that matter most right now—and what’s coming next.</p> <p>Moderated by Dennis Dollar, this discussion features insights from Greg Mesack, Brian Lauer, Zach Pfister, and Jason Stverak. Together, they’ll explore key regulatory pressures, legislative priorities on Capitol Hill, and the evolving role of advocacy in protecting and advancing the credit union and CUSO ecosystem.</p> <p>Attendees will gain a clearer understanding of critical topics—from investment authority and CUSO regulations to broader industry threats—and walk away with practical perspectives on how to engage, influence, and lead in today’s policy environment.</p> <p>Key Takeaways:</p> <ul style="list-style-type: none">• The most pressing regulatory and legislative issues impacting credit unions and CUSOs• What to expect from policymakers and regulators in the near term• How advocacy efforts are shaping the future of the industry	GH Ballroom North



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- Ways leaders can get involved and make their voices heard

Facilitator – [Dennis Dollar](#), Principal Partner, Dollar Associates, LLC

Panel – [Brian Lauer](#), NACUSO General Counsel & Partner of Messick Lauer & Smith, P.C.

[Zach Pfister](#), Principal, Brownstein Hyatt Farber Schreck

[Jason Stverak](#), Chief Advocacy Officer, Defense Credit Union Council (DCUC)

[Greg Mesack](#), Senior Vice President of Advocacy, America’s Credit Unions

11:30 AM – 12:00 PM

Fintech Accelerators: How Credit Unions Compete in a \$Billion Innovation Race GH Ballroom North

With global institutions like JPMorgan Chase investing billions annually to fuel fintech innovation, the pace of change in financial services continues to accelerate. In response, the credit union movement is building its own innovation engine through purpose-built accelerator programs.

This session brings together leaders from Circuit, Conquer/Reseda, Curql, and Filene to provide a behind-the-scenes look at how their accelerator programs identify, develop, and scale fintech solutions designed specifically for credit unions. These programs connect early-stage fintech directly with credit unions to co-create solutions that address real-world challenges—from lending and compliance to AI and fraud prevention.

Attendees will gain insight into how these accelerators are shaping the future of the industry, why collaboration between fintech and credit unions is critical, and how participating—whether as an investor, partner, or early adopter—can position organizations to remain competitive in an increasingly innovation-driven market.

Presenters – [Dustin Binns](#), Senior Project Manager, Circuit

[McKaye Black](#), Head of Incubation, Filene Research Institute

[Filip Danielewicz](#), Innovation Partnerships Manager, MSU Federal Credit Union

[Rowan Hume](#), Managing Director, Curql Accelerate powered by gener8or

[Jim Ryan](#), VP, Strategy & Growth, Curql

12:00 PM – 1:30 PM

Collaboration Lunches Porte Cochere & GH Ballroom S

Asbury C

From Referrals to Results: Real CU Integration Strategies

Come join a great panel discussion with credit union insurance program managers as they talk about what it really takes to integrate a CU-owned insurance agency into the member experience—from building branch relationships and creating “warm transfer” moments that turn referrals into results, to training and motivating frontline teams with clear goals, incentives, and feedback loops. Panelists will share the systems and workflows that make it measurable. Bring your appetite and questions.

Presenter - [Nick Bloxham](#), VP Insurance Services, SELCOGroup, Inc



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CU Power: Proving Credit Union Impact in a Data-Driven World

Sponsored by [Finalytics](#)

Credit unions have always changed lives. The challenge today isn't the mission—it's proving the impact.

In an environment shaped by AI, regulatory scrutiny, and increasing pressure to justify their relevance, credit unions and CUSO must move beyond stories alone and demonstrate measurable, credible evidence of the difference they make.

This session introduces CU Power, a practical framework designed to help credit unions and their CUSO translate everyday financial data into clear indicators of member and community well-being.

Participants will learn how to:

- Define and measure impact using real financial behavior—not assumptions
- Translate ACH and transaction data into meaningful “signals” of stability, stress, and progress
- Connect credit union activity directly to member outcomes and community value
- Build a simple, repeatable structure to demonstrate impact to boards, regulators, and policymakers

Takeaway:

Each participant will leave with a CU Power Impact Template—a practical tool to begin measuring and communicating their organization’s impact immediately.

Presenter: [Anne Legg](#), Founder, THRIVE

1:30 PM – 2:15 PM

Keynote | Kevin Roose, New York Times Bestselling Author GH Ballroom North

AI: What’s Here, What’s Coming, and What You Can Do

AI is no longer a future concept – it’s already reshaping how organizations operate, compete and serve their customers. Let’s cut through the hype and explore what’s real today, what’s rapidly approaching, and what it all means for leaders.

AI is moving faster than most organizations can keep up – but standing still isn’t an option. Kevin Roose unpacks what’s already transforming industries, what’s coming next, and where the biggest opportunities (and risks) lie. This session will challenge assumptions, separate signals from noise, and equip you with practical ways to engage with AI – before it reshapes your competitive landscape.

2:15 PM – 2:45 PM

Refreshment Break

GH Ballroom South

2:45 PM – 4:00 PM

Next Big Idea Competition

GH Ballroom North

Sponsored by [Saris AI](#)

NACUSO’s Next Big Idea competition helps identify and nurture innovative concepts that will help our industry grow and thrive;



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starting to build tomorrow – today.

4:15 PM – 5:30 PM

Hospitality Reception

GH Ballroom South

Specialty Cocktails sponsored by CU Student Choice, Powerlytics and Reseda Group

5:30 PM

Dinner on Your Own



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DAY 3 ● WEDNESDAY, APRIL 29

7:30 AM – 9:00 AM	Breakfast	Porte Cochere & GH Ballroom S.
9:00 AM – 9:25 AM	CUSO of the Year Awards Celebration <i>Sponsored by Tyfone</i>	GH Ballroom North
Join us as we celebrate CUSOs that have added value to their members, created an innovative solution to a problem, reduced operational costs, and increased income.		
9:30 AM – 10:30 AM	Keynote Elliot Eisenberg, Ph.D (<i>The Bowtie Economist</i>) Chief Economist, GraphsandLaughs, LLC	GH Ballroom North
<i>The US Economy: Tariffs, Taxes and Treasuries</i>		
Interested in a financial overview and outlook of the economic environment? Attend and discuss thoughts on how all four parts of GDP will perform, what changes are in store for the softening labor market, the path of inflation, the thinking of the Federal Reserve, the likelihood of a near-term recession, and much more.		
10:30 AM – 11:00 AM	Refreshment Break	GH Ballroom South
11:00 AM – 11:45 AM	Panel Discussion <i>Powering Influence Through Investment</i> <i>Sponsored by Hawk</i>	GH Ballroom North
As credit unions move from technology owners to strategic minority investors, and fintechs look to credit unions for differentiated capital and distribution, success depends less on adopting traditional VC or PE norms and more on understanding the distinct rules of engagement that govern this ecosystem. Discover a clear, pragmatic framework for navigating those rules – helping both credit unions and fintechs form partnerships that are strategically aligned, operationally sound, and built to endure.		
Credit unions and fintech companies are engaging with one another in fundamentally new ways. What began as credit unions forming CUSOs to own and control purpose-built technology is evolving into a more nuanced model. Credit unions increasingly participate as minority investors and strategic capital partners, while fintechs remain founder-led, independent operating companies.		
This shift creates significant opportunity but also introduces new complexity.		
For credit unions, investing as a minority owner requires a different mindset, new governance frameworks, and a clearer articulation of how strategic influence is exercised in a non-controlling ownership structure. For fintechs, raising capital from credit unions requires understanding an investor base with distinct priorities, definitions of success, regulatory constraints, and time horizons that differ meaningfully from traditional institutional capital.		



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This panel will explore the unique mechanics of strategic capital in a regulated mission-driven ecosystem and how investment structure, not just valuation, drives outcomes: from product direction and pricing philosophy to customer concentration, governance rights, and ultimately, exit optionality. While credit unions may no longer require outright control, the ability to retain meaningful influence can materially impact long-term value creation for all stakeholders.

What You Will Learn

Credit Union Executives

- How to evaluate fintech investments when ownership is minority but strategic relevance remains paramount
- Practical approaches to maintaining influence through governance, commercial alignment, and partnership design rather than control
- Why investment structure and key terms meaningfully shape outcomes, from valuation discipline and dilution protection to return economics, production direction, and partner expectations
- How to think clearly about liquidity and exit, not as the primary objective, but as a secondary consideration with powerful upside potential

Fintech Leaders

- How credit unions evaluate success beyond financial return, and why those priorities shape investment behavior
- What changes when credit unions have ownership and how aligned incentives unlock deeper partnerships, insight, and strategic contribution beyond capital
- How governance, information rights, and commercial agreements influence growth when designed correctly
- Why early decisions about structure and alignment materially affect future strategic and exit options

Panel – [David Dean](#), Head of M&A, Evergreen Financial Technology Group
[Nick Evens](#), President/CEO, Curql Collective, LLC

Moderator – [Doug Leighton](#), Former Head of Community Accounts, Visa

11:45 AM – 1:15 PM Collaboration Lunches

Porte Cochere & GH Ballroom S.

Asbury C

Member Business Lending Peer Advisory Group

The Member Business Lending (MBL) Peer Advisory Group has a long history of collaboration, and leverages NACUSO conferences for information sharing and collaboration planning. The MBL Peer Group will be meeting informally during lunch, and welcomes non-MBL attendees to attend and check out what's happening with some of the industry's leading MBL leaders.

Presenter: [Bill Beardsley](#), President, Michigan Business Connection, LC



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Asbury D

Unlocking Possibilities: Capital Deployment Strategies for Small Credit Unions in 2026

Sponsored by Savana

Small credit unions have more options than they've been told. Join a conversation about what's actually available, what's holding institutions back, and what execution looks like when you stop waiting and start unlocking possibilities.

Presenters: [Jim McBride](#), Founder, Let's Go!
[David Sims](#), CEO, Ten Talents Wealth Management
[Julie Esser](#), Founder & CEO, IgniteFI
[Amber Harsin](#), Vice President of Credit Unions, Mambu

1:15 PM – 2:00 PM

Breakout Sessions

Asbury A-B, Asbury C & Asbury D

Asbury A-B

Reimagining the Rails: Keeping the Future of Money Local

The future of money is already here – moving faster than most credit unions and CUSOs are prepared to follow. As member funds increasingly flow into digital wallets and decentralized exchanges, credit unions face a defining moment: evolve and collaborate or watch liquidity and relevance fade.

This session invites leaders to roll up their sleeves and explore how collaboration across credit unions, CUSOs, and fintech can rewrite the rails of financial infrastructure. Through the story of St. Cloud Financial Credit Union's CU-Digital Asset Vault and other emerging models, CEO Jed Meyer will show how smaller institutions can innovate safely, strategically, and together.

This conversation moves beyond theory – examining the cooperative advantage that allows community-based institutions to adapt faster, mitigate risk, and design the next generation of trust-anchored digital experiences. Attendees will leave inspired and equipped to act – understanding not just what's coming, but how to play in it without losing their identity or member mission.

Presenter – [Jed Meyer](#), CEO, St. Cloud Financial Credit Union

Asbury C

*Non-Interest Income, Equity Growth, Protecting Members, Increased Wallet Share?
What is the true value of P&C Insurance offered by a Credit Union*

Attendees will break down the non-interest income potential of an insurance CUSO and how an insurance CUSO becomes an asset with real equity on the balance sheet. Highlights include the transactional value of this equity on the open market and discussion of a recent case study of a credit union that sold their insurance CUSO. And, discover why that transaction showcases the real financial value of an insurance CUSO. Lastly, attendees will chat about the non-financial benefits insurance CUSOs bring to credit unions.

Presenters – [Nick Bloxham](#), Vice President Insurance Services, SELCO Group, Inc.



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[Ken Potter](#), Vice President, Sales, InsureOne

Asbury D

Compliance as a Growth Engine: How Credit Unions are Transforming Risk into Competitive Advantage

This panel brings together industry leaders to explore how modern compliance approaches can drive growth, enable innovation, and strengthen member trust. Following the January 2026 launch of NACUSO’s Integrated Compliance Solution – powered by de Risk Partners – this session shares real-world insights from the first wave of adopters and announces the next cohort of participating credit unions.

Presenter – [Cassie Schock](#), Partner, de Risk Partners LLC

2:00 PM – 2:30 PM

Refreshment Break

GH Ballroom South

2:30 PM – 3:15 PM

Breakout Sessions

Asbury A-B, Asbury C & Asbury D

Asbury A-B

Scaling with CUSOs to Broaden Member Reach – How Indirect Lending Empowers Credit Unions

In an era of growing consolidation, many credit unions are facing existential questions: How can we compete? How do we grow loans? How do we stay relevant? This panel explores how indirect lending, often seen as a resource-intensive program, can actually assist credit unions in these areas while decreasing fixed costs, overhead etc.

Join leaders from FocusOne Auto and several forward-thinking CUSOs and credit unions as they share real-world insights on how a scalable, outsourced indirect lending model can help institutions grow their loan portfolios, diversify risk, and better serve their communities – all without needing to merge or overextend internal capacity.

Presenters – [John Riley](#), Executive Vice President of Sales & Marketing, FocusOne™ CUSO

[T.W. Jolly Sr.](#), EVP & COO, Primeway Federal Credit Union

[Kurt Howard](#), Chief Operating Officer, FocusOne™ CUSO

[Robert Brant](#), Chief Executive Officer, Keystone Lending Alliance CUSO

Asbury C

Estate Planning in Credit Unions: What Works, What Fails, What Next

Estate planning shows up on plenty of roadmaps, yet many credit unions still struggle to turn it into durable member value. This session aims to surface the hard truths and the workable paths forward. Daniel will facilitate a candid discussion on what has actually worked across credit unions, where efforts have stalled, and how to align on member outcomes first, then choose the technology that serves them. We will examine delivery models side-by-side, including partnerships and CUSO participation, and weigh the trade-offs in governance, compliance, operational lift, data stewardship, and measurable ROI.



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To ground the conversation, Daniel will reference Trust & Will’s experience supporting programs at scale and the 2025 Curql investment as a case study in alignment between fintech and the credit union ecosystem, not as a product showcase. The intent is to challenge assumptions, invite disagreement, and leave attendees with tools they can use the day they get home.

Attendees will walk away with a plain-English rubric for deciding whether to launch, expand, or sunset an estate planning benefit; a checklist for board and risk partners; and a 90-day field-set plan that measures real member impact rather than vanity metrics. No pitches. Just the work.

Presenter – [Daniel Goldstein](#), Co-Founder & President, Trust & Will

Asbury D

The Future of Fintech-CU Collaboration: Lessons from the Front Lines

As fintech innovation accelerates, credit unions face a critical challenge – how to evaluate, integrate, and scale new technologies without losing their cooperative identity or member focus. This session brings together three emerging fintech leaders actively partnering with credit unions to modernize lending, marketing, and member engagement.

Through a candid discussion moderated by Ben Rempe, attendees will hear firsthand from innovators who are navigating go-to-market challenges, compliance hurdles, funding pressures, and the unique dynamics of serving credit unions versus traditional banks.

Together, we’ll explore what’s wrong, what’s not, and what the future of collaboration looks like when fintechs and credit unions approach partnership as co-creation rather than procurement. Expect real examples, honest dialogue, and actionable takeaways from leaders shaping the next wave of fintech-CU success stories.

Moderator – [Ben Rempe](#), Founder & Managing Member, Limitless Growth Guild

Panel – [Scott Venerable](#), Founder/Principal, ProActive

[Austin Wentzlaff](#), CEO/Founder, Nook

[Karan Bhalla](#), CEO/Founder, AiVantage

3:30 PM – 4:15 PM

Breakout Sessions

Asbury A-B, Asbury C & Asbury D

Asbury A-B

Business Lending 2036: What Will it Look Like?

Automation and AI are finally coming to business lending. Find out what has been going on and what industry leaders are working on.

Presenters – [Justin Conrey](#), President/CEO, CU Business Group

[Todd C. Mason](#), Chief Operating Officer, MBC Loans

[Ian Lampl](#), Co-founder and CEO, LoanStreet Inc.

[Nicole Haverly](#), Vice President–Credit Unions, nCino

Asbury C



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The Collaboration Play: How Diverse CUSOs Win Together

What happens when a group of CUSO CEOs, each running a completely different kind of business, decides to stop competing and start collaborating? You get something remarkable: a circle of trust, fresh ideas and exponential growth.

Meet the CUSO Cousins Roundtable, a peer group of a dozen-plus CUSO leaders who meet each month to trade insights, ask hard questions and open doors for one another. Their secret isn't just that they collaborate; it's how they do it. Each CUSO brings something unique to the table, from ServiStar's high-touch leadership consulting to TruTreasury's specialized managed services to Storyfi's creative storytelling for the financial services world. They're intentionally different, which makes their conversations richer and their connections stronger.

In this session, you'll hear the story of how this group came together, what they've learned from each other and how their mix of diverse strengths has fueled unexpected partnerships and real business results. You'll walk away rethinking what collaboration could look like for your CUSO and how "playing together" might just be the smartest strategy in your playbook.

Panel – [Nick Olexa](#), Co-Founder/CEO, Storyfi
[Taylor Murray](#), President/CEO, ServiStar Consulting
[John Ballantyne](#), Founder/CEO, Tru Treasury

Asbury D

Unlocking Mobility and Growth: How Credit Unions Can Lead America Out of the Mortgage Lock-In Crisis

Members can't move. Balance sheets can't flex. Growth is stuck. But it doesn't have to be this way.

Discover how the DREAM program adapted global mortgage models to eliminate lock-in, and how CUSOs can deploy it to free members, unlock demand, and modernize mortgage finance in the U.S.

Presenters – [Jonathan Arad](#), CEO, Takara Capital
[Michael Abraham](#), Chief Strategy Officer, Great Lakes Credit Union

4:15 PM – 5:00 PM	Keynote Sarah Bang NCUA Chief of Staff and Senior Advisor to Chairman Hauptman	GH Ballroom North
	<i>Session information coming soon</i>	
5:00 PM – 6:00 PM	Hospitality Reception Specialty Cocktails sponsored by Lender Compliance Technologies and StructureFirst	GH Ballroom South
6:00 PM	Exhibitor Teardown	GH Ballroom South



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DAY 4 ● THURSDAY, APRIL 30

Transformation Thursday – Join us to learn more about what the industry’s leading fintech accelerators are working on. Delivered in partnership with **Conquer, Converge, Curql, Filene, Circuit (MDC)** and **Trustage** will give you a sneak peek at what is on the horizon for your institution.

7:30 AM – 8:30 AM	Breakfast	Asbury A-B
8:30 AM – 8:40 AM	What is an Accelerator? Discover more about accelerators, their purpose, composition, and operational model.	Asbury A-B
8:40 AM – 10:15 AM	Accelerator Showcase Join us for 18, 4-minute presentations, in a rapid-fire format, about the products/services industry accelerators are working to bring to the credit union market.	Asbury A-B
10:15 AM – 10:30 AM	Refreshment Break	Asbury Foyer
10:30 AM – 12:15 PM	Meetings Dual opt-in meetings with hosts and participants	Asbury A-D
12:15 PM	Conference Concludes	