

# ROCHDALE + VLI

**JANUARY 24 - 27, 2024**

**BONUS SESSION – JANUARY 23RD**

**GRAND HYATT KAUAI RESORT & SPA**

**TUESDAY, JANUARY 23, 2024**

Time	Session
7:15 – 8:30	Bonus Session Registration
	Bonus Sessions – Choose One
8:30 – 10:00	<b>CU of 2034: Transformation of Next 10 Years will be Greater than the Last 100 Years</b> <i>Jamie Jackson, CEO &amp; Founder, Arkatechture</i> <i>Jeff Kline, CEO, Members Development Company</i> <i>Kris Kovacs, CEO &amp; Founder, Constellation Digital Partners</i> <i>Tony Ferris, President &amp; CEO, Rochdale</i>
8:30 – 10:00	<b>Credit Union Fundamentals for New and Tenured CU Officials</b> <i>James L. This, PhD, President &amp; CEO, James L. This and Associates</i>
10:00 – 10:15	Break
10:15 – 11:30	Bonus Sessions Continue
11:30	Networking Lunch (Bonus Session Attendees)
4:00 – 6:00	Registration

## WEDNESDAY, JANUARY 24, 2024

Time	Session
7:15 - 3:30	<b>Registration</b>
8:15 - 8:30	<b>Welcome to VLI-Hawaii</b> <i>Tony Ferris, President &amp; CEO, Rochdale</i> <i>James L. This, President &amp; CEO, James L. This &amp; Associates</i>
8:30 - 9:30	<b>Adventurous Thinking</b> <i>Sally Dominguez, Futurist, Inventor, Entrepreneur, Modern Resilience Expert</i>
9:30 - 9:45	<b>Break</b>
9:45 - 10:45	<b>Regulatory Update – Part 1</b> <i>Todd Harper, Board Chair, National Credit Union Administration</i> <i>Brian Knight, President &amp; CEO, National Association of State Credit Union Supervisors</i> <i>Facilitated by: Jeff Owen, COO, Rochdale</i>
10:45 - 11:00	<b>Break</b>
11:00 - 12:00	<b>Regulatory Update – Part 2</b> <i>Todd Harper, Board Chair, National Credit Union Administration</i> <i>Brian Knight, President &amp; CEO, National Association of State Credit Union Supervisors</i> <i>Facilitated by: Jeff Owen, COO, Rochdale</i>
12:00 - 1:15	<b>Lunch</b>
1:15 - 2:15	<b>Navigating Uncertain Waters</b> <i>Esther George, Former President of Federal Reserve Bank of Kansas City</i>
2:15 - 2:30	<b>Break</b>
2:30 - 3:30	<b>Enhancing Board Governance Over Risk and Strategy</b> <i>Mark Beasley, PhD, CPA, Alan T. Dixon Distinguished Professor of Accounting &amp; Director of the ERM Initiative, North Carolina State University</i>

## THURSDAY, JANUARY 25, 2024

Time	Session
6:30 – 8:30	Buffet Breakfast
8:30 - 9:30	<b>Strong Small CUS – Strong CU Movement</b> <i>Tom Sakash, Manager, Small Credit Union Initiatives, America's Credit Unions</i>
9:30 - 9:45	Break
9:45 - 10:45	<b>Economic Update: Soft Landing in the Bag?</b> <i>Byron Gangnes, Professor Emeritus of Economics, University of Hawaii at Manoa</i>
10:45 - 11:00	Break
11:00 - 12:00	<b>AI for Credit Unions: Myths &amp; Realities</b> <i>Pankaj Kulshreshtha, CEO &amp; Founder, Scienaptic Systems Inc.</i>
12:00 - 1:15	Lunch
1:15 – 2:15	<b>What's Happening in the CUSO World?</b> <i>Becky Reed, CEO &amp; Founder, Becky Reed as a Service and Former CEO, Lone Star CU</i>
2:15 – 2:30	Break
2:30 - 3:30	<b>Asset Breakouts (Choose One)</b>
	Assets under \$500 million
	Assets between \$500 million and \$1 billion
	Assets between \$1 billion and \$3 billion
	Assets greater than \$3 billion
	Supervisory/Audit Committee
6:00	<b>Ohana Dinner</b> <i>Invitation only for attendees who have come to five or more Hawaii Institutes</i>

## FRIDAY, JANUARY 26, 2024

Time	Session
6:30 - 8:30	<b>Buffet Breakfast</b>
8:30 - 9:30	<b>CFPB: What is the Credit Union Impact?</b> <i>Suzanne Weinstein, CEO, Orlando CU, CFPB Advisory Committee Member</i>
9:30 - 9:45	<b>Break</b>
9:45 - 10:45	<b>Which Definition of 'Aloha' Will it Be? Hello Or Goodbye to Members &amp; Management?</b> <i>Frank Diekmann, Co-operator in Chief, CUToday.info</i> <b>Panelists:</b> <i>Aaron Palmer: TwinStar Credit Union</i> <i>Lexi Jones: Kauai Federal Credit Union</i> <i>Melissa Pederson: Wescom Credit Union</i> <i>Becky Reed: Becky Reed as a Service</i>
10:45 - 11:00	<b>Break</b>
11:00 - 12:00	<b>The Future of Payments Systems</b> <i>Prakash Natarajan, Managing Director of Payment Strategy, Strategic Resource Management</i>
12:00 - 1:15	<b>Lunch</b>
1:15 - 2:15	<b>Breakouts (Choose One)</b>
	<b>Will King Dollar be Dethroned?</b> <i>Byron Gangnes, Professor Emeritus of Economics, University of Hawaii at Manoa</i>
	<b>Studying CECL: The Naked Truth of CECL's Adoption</b> <i>Roger Jones, Partner, Hauser Jones and SAS</i>
2:15 - 2:30	<b>Break</b>
2:30 - 3:30	<b>Breakouts (Choose One)</b>
	<b>Build Your Roadmap to Using More Data and Artificial Intelligence</b> <i>Pankaj Kulshreshtha, CEO &amp; Founder, Scienaptic Systems Inc.</i>
	<b>Executive Benefits 101</b> <i>David Emery, Managing Partner, Emery Financial Group</i>
6:00	<b>Dinner in Paradise</b>

## SATURDAY, JANUARY 27, 2024

Time	Session
6:30 – 8:30	Buffet Breakfast
8:30 – 9:45	<b>Seven Items That Should Be on Every Planning Agenda</b> <i>Michael Hanson, President &amp; CEO, Massachusetts Share Insurance Corporation</i>
9:45 – 10:00	Break
10:00 - 11:00	<b>Leading the Organization of the Future</b> <i>Deedee Myers, PhD, CEO, DDJ Myers, an ALM First Company</i>
11:00	Institute Concludes