

ROCHDALE + VLI

January 27-30, 2027

BONUS SESSION – JANUARY 26TH

FAIRMONT ORCHID

Session Times and Speakers Subject to Change

TUESDAY, JANUARY 26, 2027

Time	Session
7:15 – 8:30	Bonus Session Registration
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8:30 – 10:00	The Evolved Board: From Oversight to Foresight <i>Wayne Strickland, Co-Founder, C-Suite Success</i> <i>Aviva Ajmera, CEO, SOLVE KC</i>
8:30 – 10:00	Governing the Future: IT Governance Decisions That Shape Member Success <i>Kris Kovaks, CEO & Founder, FORUM52</i> <i>Jamie Jackson, CEO & Founder, Arkatechure</i>
10:00 – 10:15	Break
10:15 – 11:30	Bonus Sessions Continues
4:00 – 6:00	Registration

WEDNESDAY, JANUARY 27, 2027

Time	Session
7:15 – 3:30	Registration
8:00 - 8:30	Welcome to VLI-Hawaii <i>Chant and Blessing</i> Welcome: Tony Ferris , President, Rochdale & Tim Ashcraft , President & CEO, Hawaii Credit Union League Announcements: James L. This , CEO, James L. This & Associates
8:30 - 9:30	The Future Begins Now <i>Erica Orange</i> , Vice President & COO, The Future Hunters
9:30 - 9:45	Break
9:45 - 10:45	Regulatory Update NCUA Representatrive TBD Brian Knight , President & CEO, NASCUS Tim Ashcraft , President & CEO, Hawaii Credit Union League Facilitated by: Roberta Rodgers , Vice President, Rochdale
10:45 - 11:00	Break
11:00 – 12:00	Economic Update Byron Gangnes , Professor Emeritus of Economics, University of Hawaii at Manoa
12:00 - 1:15	Lunch
1:15 – 2:15	Why Growth Matters? The Pursuit of Scaling Through Organic Strategy and Opportunities with Mergers and Consolidation in the Credit Union Industry Mark Meyer , President & CEO, Filene
2:15 - 2:30	Break
2:30 - 3:30	Outpaced or Outsmart: The Future of Credit Union Lending Don Arkell , Owner, CU Lending Advice

THURSDAY, JANUARY 28, 2027

Time	Session
7:00 – 8:30	Buffet Breakfast
8:30 - 9:30	Cracking the Code: How Credit Unions Can Win Over Gen Z <i>Harrison Hochman, CEO, Sparrow</i>
9:30 - 9:45	Break
9:45 - 10:45	Boards are Often Flying Blind: How ERM Changes That <i>Mark Beasley, Alan T. Dixon Distinguished Professor of Accounting & Director of ERM Initiative, North Carolina State University</i>
10:45 - 11:00	Break
11:00 - 12:00	Legal Landmines: How to Tame the Lions without Becoming Lunch <i>John DeLoach, Shareholder, WilliamsGautier Law Firm</i>
12:00 - 1:15	Lunch
1:15 – 2:15	The Payments Shift Reaching your Board Table: Real-time Rails, Stablecoins, and Agentic Commerce in 2027 <i>Henry M Kim, Associate Professor, Schulich School of Business at York University</i>
2:15 – 2:30	Break
2:30 - 3:30	Asset Breakouts (Choose One)
	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	Ohana Dinner <i>Invitation only for attendees who have come to five or more Hawaii Institutes</i>

FRIDAY, JANUARY 29, 2027

Time	Session
7:00 - 8:30	Buffet Breakfast
8:30 - 9:30	Why 2027 Is So Far From 1997 (And Yet in Some Ways, Very Much the Same) <i>Frank Diekmann, Credit Union Journalist, CU Daily, LLC</i>
9:30 - 9:45	Break
9:45 - 10:45	Fraud, Cyber Risk, and Protecting Your Credit Union's Greatest Assets <i>Kate Kortsch, President, KII Consulting, Inc.</i>
10:45 - 11:00	Break
11:00 - 12:00	Will the Agent Recommend You? Preparing your Credit Union for the Agentic Member <i>George Estrada, Founder & Principal, Orion Digital Services</i>
12:00 - 1:15	Lunch
1:15 - 2:15	Breakouts (Choose One)
	Tracking the Economy: What Do the Numbers Mean? <i>Byron Gangnes, Professor Emeritus of Economics, University of Hawaii at Manoa</i>
	Winning Walletshare: How Credit Unions Can Transform Elusive Pockets of Membership into Multi-Product Members <i>Harrison Hochman, CEO, Sparrow</i>
2:15 - 2:30	Break
2:30 - 3:30	Breakouts (Choose One)
	Audits are a Journey - We'll Guide the Way... Continued <i>Brandon Wilson, Principal, Doeren Mayhew Advisors, LLC</i>
	Acquiring a Bank: A New Way to Build Member Value <i>Mike Ensweiler, Principal, ALM First</i> <i>Doug Hillhouse, Managing Director, ALM First</i>
5:30 pm	Dinner in Paradise Luau

SATURDAY, JANUARY 30, 2027

Time	Session
7:00 – 8:30	Buffet Breakfast
8:30 – 9:45	After the Midterms: Coalitions, Communities, and the Future of Public Policy <i>Colin Moore</i> , Director, Matsunaga Institute for Peace & Conflict Resolution & Associate Professor, University of Hawaii Economic Research Organization
9:45 – 10:00	Break
10:00 - 11:15	Strategic Issues Panel Discussion <i>David Tuyo</i> , President & CEO, Peak Credit Union <i>Todd Lane</i> , President & CEO, California Coast Credit Union <i>Deena Otto</i> , President & CEO, Southland Credit Union <i>Moderated by Tony Ferris</i> , CEO, Rochdale
11:15	Institute Concludes