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** |
| | **Bonus Session** |
| 8:30 – 10:00 | **The Evolved Board: From Oversight to Foresight**<br>***Wayne Strickland,*** *Co-Founder, C-Suite Success*<br>***Aviva Ajmera,*** *CEO, SOLVE KC* |
| 8:30 – 10:00 | **Governing the Future: IT Governance Decisions That Shape Member Success**<br>***Kris Kovaks,*** *CEO & Founder, FORUM52*<br>***Jamie Jackson,*** *CEO & Founder, Arkatechture* |
| 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**<br>*Chant and Blessing*<br>*Welcome:* ***Tony Ferris****, President, Rochdale &* ***Tim Ashcraft****, President & CEO, Hawaii Credit Union League*<br>*Announcements:* ***James L. This****, CEO, James L. This & Associates* |
| **8:30 - 9:30** | **The Future Begins Now**<br>***Erica Orange,*** *Vice President & COO, The Future Hunters* |
| **9:30 - 9:45** | **Break** |
| **9:45 - 10:45** | **Regulatory Update**<br>***NCUA Representatrive TBD***<br>***Brian Knight****, President & CEO, NASCUS*<br>***Tim Ashcraft****, President & CEO, Hawaii Credit Union League*<br>***Facilitated by: Roberta Rodgers****, Vice President, Rochdale* |
| **10:45 - 11:00** | **Break** |
| **11:00 – 12:00** | **Economic Update**<br>***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**<br>***Mark Meyer,*** *President & CEO, Filene* |
| **2:15 - 2:30** | **Break** |
| **2:30 - 3:30** | **Outpaced or Outsmart: The Future of Credit Union Lending**<br>***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 Unons Can Win Over Gen Z**<br>***Harrison Hochman,*** *CEO, Sparrow* |
| **9:30 - 9:45** | **Break** |
| **9:45 - 10:45** | **Boards are Often Flying Blind: How ERM Changes That**<br>***Mark Beasley,*** *Alan T. Dixon Distinguished Professor of Accounting & Director of ERM Initiative, North Carolina State University* |
| **10:45 - 11:00** | **Break** |
| **11:00 - 12:00** | **Legal Landmines: How to Tame the Lions without Becoming Lunch**<br>***John DeLoach,*** *Shareholder, WilliamsGautier Law Firm* |
| **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**<br>**Henry M Kim,** *Associate Professor, Schulich School of Business at York University* |
| **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**<br>*Invitation only for attendees who have come to five or more Hawaii Institutes* |

## 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)***<br>***Frank Diekmann,*** *Credit Union Journalist, CU Daily, LLC* |
| 9:30 - 9:45 | ***Break*** |
| 9:45 - 10:45 | **Fraud, Cyber Risk, and Protecting You Credit Union's Greatest Assets**<br>**Kate Kortsch,** President, KII Consulting, Inc. |
| 10:45 - 11:00 | **Break** |
| 11:00 - 12:00 | **Will the Agent Recommend You? Preparing your Credit Union for the Agentic Member**<br>**George Estrada,** Founder & Principal, Orion Digital Services |
| 12:00 - 1:15 | **Lunch** |
| 1:15 - 2:15 | **Breakouts *(Choose One)*** |
| | **Tracking the Economy: What Do the Numbers Mean?**<br>***Byron Gangnes,*** *Professor Emeritus of Economics, University of Hawaii at Manoa* |
| | **Winning Walletshare: How Credit Unions Can Transform Elusive Pockets of Membership into Multi-Product Members**<br>***Harrison Hochman,*** *CEO, Sparrow* |
| 2:15 - 2:30 | **Break** |
| 2:30 - 3:30 | **Breakouts (Choose One)** |
| | **Audits are a Journey - We'll Guide the Way…Continued**<br>***Brandon Wilson,*** *Principal, Doeren Mayhew Advisors, LLC* |
| | **Acquiring a Bank: A New Way to Build Member Value**<br>***Mike Ensweiler,*** *Principal, ALM First*<br>***Doug Hillhouse,*** *Managing Director, ALM First* |
| 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**<br>***Colin Moore,*** *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**<br>***David Tuyo****, President & CEO, Peak Credit Union*<br>***Todd Lane****, President & CEO, California Coast Credit Union*<br>***Deena Otto****, President & CEO, Southland Credit Union*<br>***Moderated by Tony Ferris****, CEO, Rochdale* |
| **11:15** | **Institute Concludes** |