2019 Conference Agenda
Washington, D.C.

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Monday, July 22, 2019

12:00 to 3:30 pm	Registration Desk Open – **East Registration Desk**
5:00 to 7:00 pm	**Kick-off Reception** – Credit Union House *Meet in lobby at 4:15pm for buses*

Tuesday, July 23, 2019

7:30 am to 4:00 pm	Registration Desk Open – **East Registration Desk**
7:30 to 8:30 am	Hot Breakfast – **Hampton Ballroom Foyer**
8:30 to 9:00 am	**Welcome – EC & The Maryland/DC League** – **Hampton Ballroom**
9:00 to 10:30 am	**General Session: The Impact of Education Youth Financial Literacy Update from the NCUA:** *Ken Worthey* - **Hampton Ballroom**

The NCUA kicks-off the first general session with an update on youth financial literacy research, data and resources from across the federal government.

10:30 to 10:45 am	Break
10:45 am to 11:45 am	**Resource Spotlight: Developing Financial Capability:** *Leslie Jones, CFPB* – **Hampton Ballroom**

Learn teaching techniques and learning strategies you can use to help build financial capability in youth and adults. We will spotlight CFPB's Resources and Financial well-being research. In this session, review activities and resources that you can use to build financial capability and find ideas to share with your colleagues. The CFPB offers a variety of teaching strategies and activities that makes it easy to teach the skills needed to understand personal finance.

11:45 to 1:00 pm	Lunch on your own
1:00 to 1:30 pm	Exhibitor Introductions (Special giveaway!!!) – **Hampton Ballroom**
1:30 to 2:30 pm	**Breakout Sessions 1**

1. **CTE/Workforce Partnerships** – **Governor's Room**
   Kelli Holloway & Rachel House, State Employees Credit Union

Career Technical Education (CTE) provides students of all ages with the academic and technical skills, knowledge and training necessary to succeed in future careers and to become lifelong learners. In total, about 12.5 million high school and college students are enrolled in CTE across the nation. In this session we will discuss how your credit union can utilize and solidify CTE and workforce connections to accelerate your relationships within the school system. The collaborative efforts through these partnerships ensure financial education through work-based learning!

2. **Teen Involvement**: **Beyond Managing Money** – **Hampton Ballroom**
   Aerik J Radley, CUDE, CCUFC, SECNY Federal Credit Union

During this workshop we will practice the art of finding financial education in all things "teen." Life is different now than it ever has been before for teenagers, and the same goes for financial education. We will dive into taking a program from theory and developing habitual actions to critical thinking and application in different scenarios and circumstances to engage the whole teenager.

3. **Podcasts, Webinars, and Social Media** – **Calvert Room**
   Martin Lehman, Golden 1 Credit Union

Looking for new and innovative ways to spread financial wellness to your members and maybe even reach non-member listeners? Learn how to create and publish podcasts, write and host webinars, and use social media to inform and educate your audience. We will go over the tools and techniques needed to become a technology leader in financial education.

4. **The Untapped Market: Using CU@Work Programs as a Retail Banking Channel** *Katherine Coats-Thomas, EverFi* – **Chairman's Room**

How can your financial institution compete in this crowded playing field? How can your credit union reach new consumers and build better relationships when less of them are heading into branches? The answer is to meet consumers where they already spend much of their time: at work. In this session, we'll outline the steps necessary to develop and enhance workplace banking programs, while covering the retail benefits of building relationships through this relatively untapped market.

2:30 to 2:45 pm		Break & Visit with Vendors –**Hampton Ballroom**

2:45 to 4:15 pm **General Session: Raising Future Millionaires: Empowering Parents to Engage & Educate**
Holly D. Reid Toodle, CPA The Master Playbook – **Hampton Ballroom**

Despite the strong influence of pop culture and modern society, children still look to their parents as the key source of education on money matters. In this session, we will:

- Help parents get prepared to have the talk about money and financial responsibility
- Share practical examples & program ideas to equip parents with the tools they need
- Learn strategies to attract, engage and retain parent members.

Come ready to laugh, learn, and leave with fresh ideas to strengthen the families we serve!

4:15 to 5:15 pm Exhibitor Reception – **Hampton Ballroom**

Wednesday, July 24, 2019

8:30 to 10:00 am Hot Breakfast – Regional Meetings – **Hampton Ballroom Foyer**

- Western – **Chairman's Room**
- Central – **Calvert Room**
- East – **Governor's Room**

10:00 to 10:30 am Break with Exhibitors – **Hampton Ballroom**

10:30 to 11:30 am **Breakout Sessions 2**

1. **Full-Service Student Branches** – **Governor's Room**
   Patty Hutton, Educational Employees Credit Union

Is it possible to open a student run branch with a teller line staffed only by high school students? Is it realistic to expect the branch to be open normal business hours? Could the full-service branch stay open year-round and serve the public? Yes, yes and YES! Come and hear how Educational Employees Credit Union (EECU) partnered with a local high school to open a full-service student branch on campus. Learn about EECU's Student Financial Services

Representative training/mentoring program, their unique business model and collaborative partnership with the high school, and the financial literacy education the students receive in the classroom and in the branch. This session is a must for any credit union interested in a student run branch!

2. **Making Personal Finance Personal** – **Calvert Room**
   Brilene Faherty, Money Experience

Engagement is everything. This workshop explores how financial education focused on quality of life and personal priorities helps students connect with their future selves and understand how their 'real lives' and 'financial lives' are one and the same. Money Experience's Curriculum Director, Brilene Faherty, brings stories from the field and user data to illustrate how this approach helps students engage in their own financial well-being, as well as tips for leading lively discussion and how to advocate for financial education at your institution.

3. **Connecting the Dots through Financial Education** – **Chairman's Room**
   James Matthews, Knowledge of Financial Education (KOFE)

We all know that generational poverty is a problem that must be addressed. We understand that differences in education levels are a major factor. Many turn to financial education, but flawed execution causes mixed results. The major obstacle for our industry is that we are unsure of exactly what is needed to accomplish such ambitious goals and truly make a difference. KOFE's James Matthews outlines the essential tools and guidelines needed to implement financial education confidently and effectively. Learn how to increase awareness, engagement, and acquisition by improving financial literacy in your community.

11:30 to 1:00 pm	Lunch on your own
1:00 to 2:30 pm	**Resource Spotlight:** ***America Saves for Young Workers, NEFE, & Jump$tart*** – **Hampton Ballroom**
2:30 to 3:00 pm	Snack Break & Door Prizes – **Hampton Ballroom**
3:00 to 4:00 pm	**Breakouts Session 3**

1. **Sharpening Presentation Skills: Finding the "Hero within" to Capture, Engage and Influence Your Audience** – **Governor's Room**
   Kelli Holloway, State Employees Credit Union

For many of us, our primary resource for getting financial education "out there" is through giving presentations to members, youth groups and community partners. Regardless of the audience, effective public speaking is a key component of any successful presentation. In this session attendees will gain tangible "tips and tricks" to cultivate an awareness of verbal and non-verbal components of presenting. Participants will learn public speaking techniques, tailor delivery methods to presentation type, and provide constructive self-assessment and evaluation. This will be an opportunity for new and seasoned presenters to acquire more experience in delivering speeches effectively and polish existing skills in a fun setting!

2. **Uncomfortably Comfortable: Digital transformation & rewiring for a new, modern age** *Mike Vien, Wallit* – **Chairman's Room**

Learn how credit unions can win in a mature, highly regulated industry that is struggling to keep pace with marketplace changes. We'll talk about how credit unions can grow by redesigning their customer experiences around good "Money Moments" not financial products, why lead gen programs are more important than ever, and the importance of focusing on families with teens and tweens.

3. **Alternatives in Education: Partnering Outside of Schools** – **Calvert Room**
   Kate Sullivan, City of Boston Credit Union

Think beyond the classroom! There is a whole audience that is in need of financial education, from Seniors to school age and rec centers to rehabs. Let's chat alternative classrooms, why they are important, how to get your foot in the door and customizing curriculum for your audience.

6:00 to 6:30 pm	Annual Meeting – **Hampton Ballroom**
6:30 to 9:00pm	Dinner/Awards Banquet/Celebration (Karaoke, dancing & fun) – **Hampton Ballroom**

Thursday, July 25, 2019

7:30 to 9:00 am Breakfast on your own

9:00 to 10:30 am **NYIB Ignite (formerly known as Best Practices) - Hampton Ballroom**

Would you like to ignite cool new ideas and concepts that have been successful for your credit union? Then you should consider doing NYIB Ignite! Presenters get to tell their stories through 20 slides, which automatically advance every 15 seconds. The result is a fast and fun presentation, which lasts just 5 minutes. Speakers must pick one topic related to something your credit union has done with financial education (for any age), student branches, best practices, or anything related to the NYIB focus. Attendees will vote for their favorite presentation. The winner will receive a free registration for the next NYIB conference!

10:30 to 11:45 am **General Session: Taking it to the Next Level**
Hallie Davis, Global Financial Literacy Excellence Center - **Hampton Ballroom**

Research shows financial literacy levels are alarmingly low in the U.S. However, financial education has shown to be effective in improving financial knowledge and behavior of youth, when implemented well. The field of financial literacy has grown rapidly within the last few years which has helped expand our understanding of what works. This session will cover the research behind why financial literacy matters, how the U.S. is doing, and how to effectively help youth be better prepared for their financial future. Take away actionable steps to impress management and your Board of Directors and engage your membership and communities.

11:45 to 12:00 pm **Fond farewells!!**

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