



CU BUSINESS GROUP NATIONAL BUSINESS SERVICES CONFERENCE

2025 San Diego Conference Agenda


Monday, September 29th

All conference events will take place at The Westin San Diego Gaslamp Quarter hotel. Agenda is subject to change.

10:00 a.m.	Registration Opens	San Diego Ballroom Foyer (4th floor)
11:30 – 12:45 p.m.	Members Only Lunch – CUBG Member CUs Only	Plaza (2nd floor)
1:00 – 3:00 p.m.	Early Bird Education Sessions – additional fees apply	
	C&I Lending: The Next Big Thing in Member Business Lending – Mike Smith, CUBG	Harbor (3rd floor)
	Mastering Business Acct. Opening: Compliance, Risk, & Best Practices – Liz Volin, CUBG	Coronado (3rd floor)
	Maximizing Revenue with SBA Lending – Justin Conrey, CUBG	Balboa (3rd floor)
4:00 – 5:00 p.m.	Welcome and Opening Keynote: Unstoppable – Alex Weber	San Diego Ballroom (4th floor)
5:00 – 6:30 p.m.	Welcome Reception	Garden Terrace (4th floor)

Tuesday, September 30th

7:00 – 8:00 a.m.	Breakfast and Product Expo	Garden Terrace (4th floor)
8:00 – 8:30 a.m.	Welcome & State of the Industry – Justin Conrey, CUBG	San Diego Ballroom (4th floor)
8:30 – 9:30 a.m.	Keynote: Key Insights on Today's Economy – Elliot Eisenberg, The Bow Tie Economist	San Diego Ballroom (4th floor)
9:45 – 10:45 a.m.	Breakout Sessions:	
	Loan Documents and Lending in an AI Universe – Gordon Gerson, Gerson Law	Harbor (3rd floor)
	Driving High Impact Business Development Activities – Jim Hanson, JDH Consulting	Del Mar (Lobby level)
	The Small Business Lending Journey: Using Real-Time Cash Flow Data & Machine Learning – Gord Baizley, Judi.AI	La Jolla (Lobby level)
	Loan Participations: Myth vs. Reality – Kristi Dorsey, CUBG	Coronado (3rd floor)
10:45 – 11:15 a.m.	Networking Break – visit our sponsors in the Product Expo Area	Garden Terrace (4th floor)
11:15 – 12:00 p.m.	Keynote: Strategies for Successful Construction Loan Management – Marcus Carter, La Mesa Fund Control & Escrow & Mike Smith, CUBG + CU panelists	San Diego Ballroom (4th floor)





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Tuesday, September 30th (continued)

12:00 – 1:15 p.m.	Lunch	Garden Terrace (4th floor)
1:15 – 2:00 p.m.	Keynote: Expecting, Embracing, and Employing Change! – Cheri Perry, Total Merchant Concepts, CUBG + CU panelists	San Diego Ballroom (4th floor)
2:00 – 2:45 p.m.	Keynote: TBD	San Diego Ballroom (4th floor)
3:00 – 4:00 p.m.	Breakout Sessions:	
	Taking the SBA Lending Leap: Why You Should Dive In! – Mike Smith, CUBG	Coronado (3rd floor)
	Unleashing Insights: Transforming Data into Smarter Lending Decisions – Charlie Wilson, Abrigo	La Jolla (Lobby level)
	Lending Better, Faster and More: Harnessing AI to Win the Future of Member Business Lending – Mike Horrocks, Baker Hill	Del Mar (Lobby level)
	Prospecting & Interviewing for Treasury Management Sales Success – Liz Volin & Julie Morrison, CUBG	Harbor (3rd floor)
4:00 – 4:30 p.m.	Networking Break – visit our sponsors in the Product Expo Area	Garden Terrace (4th floor)
4:30 – 5:15 p.m.	Keynote: Winning Millennial-Run Businesses – Jennifer Dimenna, Apiture	San Diego Ballroom (4th floor)
5:15 – 6:30 p.m.	Networking Reception – visit the Product Expo for refreshments	Garden Terrace (4th floor)

Wednesday, October 1st

7:30 – 8:30 a.m.	Breakfast and Product Expo	Garden Terrace (4th floor)
8:30 – 9:30 a.m.	Keynote: The 4 Stages of AI Adoption – Kirk Drake, CU 2.0	San Diego Ballroom (4th floor)
9:45 – 10:45 a.m.	Breakout Sessions:	
	From Loan-Centric to Full-Service: Using Extended Deposit Insurance to Capture the Entire Commercial Wallet – Adam DeVita, ModernFi	Del Mar (Lobby level)
	TBD – Identifree	Harbor (3rd floor)
	TBD – Fundica	Coronado (3rd floor)
	5 Hot Trends in Commercial Real Estate – Scott Powers, CUBG	La Jolla (Lobby level)
11:00 – 11:45 a.m.	The Ultimate Recall Challenge – Mike Smith, CUBG	San Diego Ballroom (4th floor)
11:45 a.m.	Conference Closes	

