

CUFINHEALTH™ 23

April 18-20, 2023 | Las Vegas, NV

About the conference

Join us to explore the credit unions' role in improving people's financial well-being and health. Now in its seventh year, CU FinHealth™ examines how credit unions are measuring their members' financial and well-being, working to improve it and documenting the results. The conference also explores the connections between financial well-being, physical health, payments, technology and advocacy.

We will discuss multi-sector solutions to address the drivers of financial well-being and health, learn from each other's efforts, explore strategies for engaging new partners, and leverage technology to truly improve our members', employees' and communities' financial well-being. CU FinHealth™ 23 is co-hosted by the National Credit Union Foundation, the Cornerstone Foundation and the California & Nevada Credit Union Leagues.

Important Notes

- The conference will be held at the Cosmopolitan of Las Vegas.
- General sessions and meals will take place in the Nolita conference space.

Objectives

By the end of this conference, participants will:

- Understand the current state of financial well-being through research, data, and practitioner perspective.
- Learn how to enhance the member and employee experience with inclusive initiatives and impact measurement.
- Create partnerships through collaborative discussions, activities, and networking opportunities.
- Address industry issues and find the solutions to overcome barriers to financial well-being for all.
- Gather and share resources to enrich programs, strengthen strategic initiatives, and reinforce sustainability plans.
- Discover ways to revolutionize financial health with innovative products, services, and platforms.

To view full speaker information, including bios, please visit ncuf.coop/cufinhealth

A cooperative partnership between

Day 1 - Diversity, Equity, Inclusion, and Accessibility (#DEITuesday)

Registration 7:00 AM

Buffet 8:00 AM

Opening Remarks 9:00 AM

- Gigi Hyland | Executive Director, National Credit Union Foundation
- Courtney Moran | Executive Director, Cornerstone Foundation
- Larry Palochik | Executive Vice President, California & Nevada Credit Union Leagues

Keynote - Empowering Financial Futures 9:10 AM

- Jim Nussle | President & CEO, Credit Union National Association

Panel - Current State of Financial Well-being for Vulnerable Communities 9:45 AM

Understand how changing demographics in the United States relate to DEI and the work of credit unions.

- Moderator and speakers: TBD

Break 10:15 AM

Breakout sessions 10:30 AM

Enhance the Experience with DEI, Belonging and Accessibility

Connect with the leading organizations addressing inequities through research and products. Learn how to reduce financial well-being gaps for the underserved and create opportunities for the financial success your members, employees, community, and credit union.

Break

One thing

This is a rapid fire “speed meeting” session where you get to know each other and increase the knowledge on financial health by learning one new thing in 30 minutes. Get ready to move and have fun.

It's all connected: How financial health is an inclusion story

11:00 – 11:45 AM

Oftentimes, we bucket efforts into discrete categories. When it comes to financial health, though, you can't separate the profound linkage to diversity, equity and inclusion. This session will focus on bringing those connections to the forefront and discussing action steps you can take to unify this work together.

- Michelle Christie | Senior Manager of Financial Inclusion & Impact, National Credit Union Foundation – Moderator
- Ann Solomon | SVP, Inclusiv Next
- Angela Russell | Chief Diversity Officer, CUNA Mutual Group
- Victor Corro | President/CEO, Coopera
- Linda Bodie | Chief + Innovator, Element FCU

Group lunch

11:45 AM

Concept to action: What financial health and well-being look like in practice

12:45 – 1:45 PM

Employees who have the understanding and resources to support their own financial well-being can help empower members to navigate through their financial challenges. Measuring and tracking the impact of financial well-being for employees is crucial to the overall strategy for members. This session will focus on the engagement of employees, development of programs and collaboration with the community in the implementation of financial well-being for all.

- Gigi Hyland | Executive Director, National Credit Union Foundation – Moderator
- Devon Goetz | SVP of Human Resources & Training Development, SESLOC FCU
- Bjorn Larson | Director of Financial Well-being, BCU
- Dave Klavitter | Chief Marketing Officer, Dupaco CU
- Ruby Alvarez, CUDE | AVP – Community Development, GECU

Break

1:45 – 1:55 PM

Concept to action: Leveraging new perspectives

2:00 – 4:30 PM

This experiential session will challenge participants to problem solve using empathy and associative thinking.

- Courtney Moran | Executive Director, Cornerstone Credit Union Foundation
- Chad Helminak | Director of Programs & Impact, National Credit Union Foundation

Evening on your own

4:30 PM

Thursday, April 20

Breakfast and networking

7:30 AM

Bridging the digital divide with fintech

8:30 – 9:30 AM

How does fintech play a role in credit unions meeting member financial well-being needs? Join us for this dynamic panel to hear and learn about some of the fintech innovations credit unions are using to meet members where they are in life and help them towards financial well-being.

- Barb Lowman | President/CEO, CUNA Strategic Services (CSS) – Moderator
- Bolun Li (“Mr. Pineapple”) | Founder/CEO, Zogo
- Mike de Vere | CEO, Zest AI
- Sarah Lietz | Chief Experience Officer, Members Development Company (MDC)

Break

9:30 – 9:40 AM

Share your action plan

9:45 – 11:00 AM

- What’s next in your financial well-being for all journey?
- What resources would be useful to you?

Wrap up and send off to improve financial health and well-being for all

11:00 – 11:30 AM

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