

# CUFINHEALTH™ 22

April 25-27, 2022 | San Antonio, TX

## About the conference

Join us to explore the credit unions' role in improving people's financial well-being and health. Now in its fifth 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, technology and advocacy.

We will discuss multi-sector solution 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™ 21 is co-hosted by the National Credit Union Foundation, the Cornerstone Foundation and the California & Nevada Credit Union Leagues.

## Target Audience

Our audience is a diverse cross-section of credit union leaders (CEOs, CFOs, lending, operations and community engagement professionals) who work to make consumer financial health a strategic priority for their credit union.

## Objectives

By the end of this conference, participants will:

- Understand how credit unions are measuring, operationalizing and documenting consumer financial well-being and health.
- Understand the drivers of financial well-being and health including how physical health, wealth, and place are inextricably linked
- Be armed with at least three (3) ideas that they can take home and implement in their credit union to bring strategic focus to improving financial well-being for all.

To help you get the most out of the sessions, we'll be providing a toolkit with info to fully ground you in the credit union financial well-being and health work happening now.

A cooperative partnership between

## Monday, April 25

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5:30 PM      **Registration**

7:00 PM - 8:00 PM      **Networking reception & dinner**

## Tuesday, April 26

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7:30 AM      **Breakfast & networking**

8:30 AM      **Welcome, introductions & background**

9:00 AM      **State of the state**

A lot happened in 2021 to move the conversation around improving financial health and well-being forward. Let's talk about those efforts and the opportunities for credit unions to be engaged in this national effort.

AM

12:15 – 12:30 **FinHealth Break**

12:30 – 12:50 **Breakout Room Case Study**

This session will challenge participants with a financial well-being and health case study to research, study and collaborate on possible solutions.

12:50 – 1:30 **Case Study & Day Two Debrief**

## Wednesday, April 27

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11:00 – 11:15 **Welcome**

11:00 – 12:00 **Putting FinHealth and Well-Being for All at the Heart of Your Strategy**

This session will focus on how to drive financial well-being and health throughout your credit union from the board room to frontline staff. It will cover the business case for financial health and well-being, the execution of a strategy and the return on investment that a focus on improving people's financial health and well-being brings to credit unions.

*David Libby, CEO, Town and Country FCU*

*Erin Mendez, CEO, Patelco CU*

*Taylor Nelms, Senior Director, Research, Filene Research Institute*

*Moderator: Courtney Moran, Executive Director, Cornerstone CU Foundation*

12:00 – 12:15 **FinHealth Break**

12:15 – 1:30 **Payments Implications in Building a FinHealth and Well-Being Ecosystem**

Join leaders from our credit union payment CUSOs, CO-OP and PSCU, to hear how payments are linked with financial health and well-being and what innovations are being delivered to help build a finhealth and well-being ecosystem.

*Samantha Paxson, Chief Experience Officer, CO-OP Financial Services*

*Merry Pateuk, SVP, Industry Engagement, PSCU*

*Moderator: Gigi Hyland, Executive Director, National Credit Union Foundation*

1:30 – 2:15 **Closing Keynote**