

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 sixth 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 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™ 22 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.

Important Notes:

- All meals will be served in Hill Country Ballroom, Room D.
- All sessions will take place in Hill Country Ballroom, Rooms A-C.

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

A cooperative partnership between

Monday, April 25

5:30 PM **Registration**

6:00 PM **Networking reception & dinner**

Tuesday, April 26

7:30 AM **Breakfast & networking** (Hill Country Ballroom, Room D)

8:30 AM **Welcome, introductions & background** (Hill Country Ballroom, Rooms A-C)

9:00 - 10:00 AM **Setting the stage - How CU executives are thinking about financial health and well-being as a business strategy**

Credit unions need to balance mission and margin. More and more credit unions are placing financial health and well-being of employees and members at the heart of that balance and their strategy. Hear from CEOs on how they see financial health as a differentiator for credit unions.

- [Gigi Hyland](#), Executive Director, [National Credit Union Foundation](#) - Moderator
- [Martin Carter](#), President/CEO, [Astera CU](#)
- [Tony Budet](#), President/CEO, [UFCU](#)
- [Tonita Webb](#), President/CEO, [Verity CU](#)
- [Caroline Willard](#), President/CEO, [Cornerstone League](#)

10:00 - 10:10 AM **Break**

10:10 - 10:55 AM **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 1 new thing in 30 minutes. Get ready to move and have fun.

11:00 - 11:45 AM **It's all connected: How financial health is an inclusion story**

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](#)

- 11:45 AM **Group lunch**
- 12:45 - **Concept to action: What financial health and well-being look like in practice**
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](#)
- 1:45 - **Break**
1:55 PM
- 2:00 - **Concept to action: Leveraging new perspectives**
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](#)
- 4:30 PM **Evening on your own**

Wednesday, April 27

- 7:30 AM **Breakfast and networking** (Hill Country Ballroom, Room D)
- 8:30 - **Bridging the digital divide with fintech** (Hill Country Ballroom, Rooms A-C)
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 \(MDC\)](#)

9:30 – **Break**
9:40 AM

9:45 - **Share your action plan**
11:00 AM

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

11:00 - **Wrap up and send off to improve financial health and well-being for all**
11:30 AM

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