

CUFINHEALTH™ 21

Conference Description:

Join us to explore credit unions' role in improving people's financial well-being and health. Now in its 5th 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™ 21 is co-hosted by the National Credit Union Foundation, the Cornerstone Foundation and the California & Nevada Credit Union Leagues.

Conference 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.

Conference Format:

Hybrid: presentations, discussion and workshopping with all participants.

Virtual Conference Dates and Location:

April 21-23, 2021; 11:00 AM - 2:30 PM; **All times listed are Eastern.**

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.

Helpful background info/pre-reading: 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.

CUFINHEALTH™ 21

DAILY SCHEDULE OF EVENTS

All Times Listed in EST

11:00 Welcome, introductions & background

11:30- Financial Well-Being During a Pandemic - *Let's talk about the new landscape of financial well-*

12:30 *being that this pandemic has brought about - the economics for credit unions, the effect on all consumers' financial health and well-being and the disparate impact on women and communities of color.*

- [Mike Schenk](#), Deputy Chief Advocacy Officer for Policy Analysis & Chief Economist, CUNA
- [Brenton Peck](#), Director, Financial Health Network
- [Samira Salem](#), VP, Diversity, Equity & Inclusion, CUNA

12:30- FinHealth Break

12:45

12:45- Consumer Panel - *This panel will engage in dialogue with participants to give the true consumer view of financial well-being and health. They will discuss their challenges, frustrations and expectations of financial institutions in helping them improve their financial lives.*

1:30 **Moderator:** [Paul Bruney](#), Cote Blanche Insights and Communications, LLC

1:30- Breakout sessions to discuss insights from the panel.

2:00

2:00 Day 1 debrief

11:00 Welcome back!

11:15- It's All Connected - *A worldwide pandemic and resulting financial recession make it crystal clear*

12:15 *that health and wealth are deeply connected. Credit unions and state credit union foundations around the country are focusing on the development issues affecting their particular community. Nonprofits are working to help cancer patients navigate the financial tsunami that cancer brings. How does this all tie together and what can you take home to help your credit union connect the dots to truly improve the financial well-being of your members, employees and communities?*

- [Dave Prosser](#), SVP, Community Development, Freedom First CU
- [Carla Tardif](#), CEO, Family Reach
- [Sharee Adkins](#), Executive Director, Northwest Credit Union Foundation

12:15- FinHealth Break

12:30

12:30- Breakout Room Case Study - *This session will challenge participants with a financial*

12:50 *well-being and health case study to research, study and collaborate on possible solutions.*

12:50- Case study debrief and Day 2 wrap-up

1:30

WEDNESDAY,
APRIL 21

THURSDAY,
APRIL 22

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DAILY SCHEDULE OF EVENTS

All Times Listed in EST

11:00 Welcome back!

11:00- 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.*

- 12:00**
- [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- FinHealth Break

12:15

12:15- 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.*

- 1:30**
- [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- Wrap-up and send off to improve financial health and well-being for all
2:15

HOSTED BY:



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FOUNDATION**

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FRIDAY,
APRIL 23