

CREDIT UNION FINHEALTH19

Conference Description:

Join us to explore credit unions' role in improving financial health. Now in its 4th year, CUFinHealth examines how credit unions are measuring their members' financial health, working to improve it and documenting the results. The conference also explores the connections between financial health, physical health, technology and advocacy. We will discuss multi-sector solutions to address the drivers of financial health, learn from each other's financial health efforts, explore strategies for engaging new partners, and leverage technology to further advance financial health for credit union members, employees and our communities. CUFinHealth19 is co-hosted by the National Credit Union Foundation, the California & Nevada Credit Union Leagues and BALANCE. The conference is sponsored by generous support from PSCU and EverFi.

Conference Objectives:

By the end of this conference, participants will:

- Understand how credit unions are measuring, operationalizing and documenting consumer financial health.
- Understand the drivers of financial health including how 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 their members' financial health.

Conference Format:

Hybrid: presentations, discussion and workshopping with all participants

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.

Scholarships Available! [Click here](#) for more information!

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SUMMARY AGENDA

Wednesday, April 24

5:30 pm Registration

6:00 pm Networking Reception & Dinner

Thursday, April 25

7:30 am Breakfast & Networking

8:30 am Introductions & Background – **Larry Palochik, CA/NV Credit Union Leagues and Gigi Hyland, National Credit Union Foundation**

9:00 am State of the Field: National Update on FinHealth Trends – *This dynamic panel of nationally-known experts in the field of financial health will give attendees on updates on the newest research, trends, advances and work in financial health nationally. Come learn about how policymakers, non-profits, funders and institutions are working on FinHealth.*

10:00 -10:15 am Break

10:15-11:30 am You've measured FinHealth. Now what? – *Many credit unions are already measuring member and employee financial health. What are the next steps credit unions have taken to make financial health a strategic priority. This session will explore how employees are being trained to think in financial health terms, what's moving the needle for members and how data is being processed and utilized.*

11:30 am Group Lunch

12:45 pm "Well That Didn't Quite Work!": Lessons Learned from the FinHealth Road – *Sometimes the best learnings come from the things that didn't work. This panel will look at how we as credit unions really understand members' needs, how we think about and approach*

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implementing a coaching program, and how we implement FinHealth throughout the organization.

2:00-2:15 pm Break

2:15-3:30 pm Health, Wealth & Place: What You Can Do – *Did you know that your life expectancy is linked to your zip code? Last year we began exploring the link between physical and financial health. This panel will delve deeper into this topic and look at recent research in this area, programs that are being implemented between credit unions and health providers, as well as share perspectives on practical tips to co-locate efforts to work on members' financial and physical health.*

3:30-4:30 pm Don't Despair! Let's Share! -- *Participants will be involved in lightning round table work on several FinHealth issues. The goal? Walk away with 3 ideas/tips you can take back to implement at your credit union or organization. Topics will include:*

- 1) What are credit unions doing to put FinHealth at the center of their strategy?
- 2) How are credit unions helping members build emergency funds?
- 3) How are credit unions providing credit that is appropriate and affordable?
- 4) How are credit unions measuring and documenting the impact of their efforts?
- 5) How are credit unions collaborating/partnering to address community needs like access to food, affordable housing, transportation, etc.?

4:30 pm Evening on your Own

Friday, April 26

7:30 am Breakfast & Networking

8:30 am FinTech panel: What's happening in the savings and affordable lending arenas? – *This panel will explore innovations in FinTech that impact and affect consumer FinHealth. Panelists will share their efforts to leverage technology to help consumers with their financial health. We'll discuss alternatives to payday lending, student loan debt and payments innovations.*

9:30-9:45 am Break

9:45-11:00 am Where do we go from here and closing comments – **Larry and Gigi**