



2019 MANAGEMENT INSTITUTE

DISNEY'S BOARDWALK INN

Tuesday, February 5, 2019

7:30 am - 8:30 am	REGISTRATION & BREAKFAST <i>Convention Center: Promenade West</i>
8:30 am - 8:45 am	Welcome to the 2019 Management Institute <i>Introductions and Announcements</i>
8:45 am - 9:00 am	A Whole New World <i>Ed Swanson</i>
9:00 am - 9:45 am	Industry Update <i>Jon Jeffreys, Callahan & Associates</i>
9:45 am - 10:00 am	Temenos
10:00 am - 10:15 am	BREAK
10:15 am - 11:00 am	Leadership: Developing Your People Into Specialists <i>Jessica Workman, Advantage One Credit Union</i>
11:00 pm - 11:15 pm	Auto Exam
11:15 am - 12:00 pm	High Yield Lending Strategy & Bottom Line Impact <i>Ed Swanson</i>
12:00 pm - 1:00 pm	LUNCH <i>Flying Fish</i>
1:00 pm - 2:00 pm	Making More Money Collecting Your Bad Debt <i>Karin Brown-Purtell, with CSE & Grow Financial</i>
2:00 pm - 2:30 pm	Coaching & Staff Development the Right Way <i>Eric Liesener, BCU</i>
2:30 pm - 3:00 pm	Break & Walk to Atlantic Dance Hall
3:00 pm - 5:30 pm	Networking Event <i>Atlantic Dance Hall</i> 3:00 - 4:30 New Fantastic Point of View Networking Experience 4:30 - 5:30 Cocktails & Hors d'oeuvres

Wednesday, February 6, 2019

7:30 am - 8:30 am	BREAKFAST <i>Convention Center: Promenade West</i>
8:30 am - 9:15 am	Fostering an Entrepreneurial Spirit at Your Credit Union <i>Jack Kelly</i>
9:15 am - 10:00 am	Transforming to a Service Culture <i>Patsy Smith & Rob Amirault, People's Advantage FCU</i>
10:00 am - 10:15 am	<i>Auto Financial Group</i>
10:15 am - 10:30 am	BREAK
10:30 am - 11:00 am	Connecting With Your Employees, Community, & More <i>Brittany Breakiron, Shell FCU</i>
11:00 am - 12:00 pm	PANEL: Indirect Strategies That Drive Results <i>Moderated by Ed Swanson</i>
12:00 pm - 1:00 pm	LUNCH <i>Flying Fish</i>
1:00 pm - 1:15 pm	<i>LSI</i>
1:15 pm - 2:15 pm	Human Credit Score Simulators <i>Lorrie Wohlfeil</i>
2:15 pm - 2:30 pm	BREAK
2:30 pm - 3:00 pm	Cool Stuff We're Doing In Oregon <i>John Moore, Wauna Credit Union</i>
3:00 pm - 4:00 pm	PANEL: Strategies for Growing Deposits & Membership <i>Moderated by Bob Schroeder</i>
4:00 pm - 6:30 pm	Dinner On Your Own
6:30 pm - 9:30 pm	<i>IllumiNations: Reflections of Earth</i> Fireworks Show at Epcot Center 6:30 Meet in the Conference Center lobby & walk to Epcot 6:45 Arrive at Epcot gate & escorted to private viewing area 7:00 Cocktails & hors d'oeuvres 9:00 Fireworks show

Thursday, February 7, 2019

7:30 am - 8:30 am	BREAKFAST <i>Convention Center: Promenade West</i>
8:30 am - 9:00 am	Inside the Numbers <i>Bob Schroeder</i>
9:00 am - 9:45 am	Navigating the Changing Landscape <i>Sean Flynn, TransUnion</i>
9:45 am - 10:15 am	Payday Alternative Loans <i>Kimmie Davis, Natco Credit Union</i>
10:15 am - 10:30 am	BREAK
10:30 am - 10:45 am	<i>Element</i>
10:45 am - 11:15 am	PANEL: Diamonds in the Rough <i>Moderated by Tiffiny John & Bill Hultstrand</i>
11:15 am - 12:00 pm	Shining Shimmering Splendor <i>Estela Nagahashi, University Credit Union</i>
12:00 pm - 12:30 pm	Open Forum <i>Questions/Comments/Closing Statements</i>

**Thank You For Attending
The 2019 Management Institute!**

