

# Welcome

## Raddon Financial Group welcomes you to the 2011 Credit Union CEO Forum.

The CEO Forum is designed to help executives of large credit unions examine changing regulations, emerging technologies and competitive opportunities. This meeting will put you at the forefront of managing the coming challenges and opportunities our industry will face.

To this end, RFG has lined up a unique agenda of keynote speakers starting with David Eagleman, Renowned Neuroscientist and International Bestselling Author. David will discuss Cognitive Neuroscience of Financial Decisions.

Additionally, we're proud to offer interactive group discussion among your credit union peers during our CEO Panel Discussion and timely presentations from industry-leading speakers, including: Louis Hernandez, Jr., Chairman of the Board and CEO of Open Solutions Inc.; Terrence Roche, Principal, Cornerstone Advisors, Inc.; Dennis Dollar, Principal Partner, Dollar Associates LLC & former NCUA Chairman; and Bill Handel, RFG's VP of Research and Product Development.

The forum focuses on the future of large credit unions and is specifically designed for chief executives and directors of credit unions with assets of \$500 million or more.

## Crystal Performance Award Winners!



We are pleased to recognize our Crystal Performance Award winners. The Crystal Performance Award recognizes credit unions for achieving a top 10 ranking in performance based on the RFG Performance Index, a balanced scorecard measurement of growth, income, efficiency and margin management.

RFG recognizes two asset groups for this award: credit unions with assets greater than \$500 million and credit unions with assets less than \$500 million. We look forward to your participation as we recognize their achievements during the Crystal Performance Awards Dinner on Thursday, August 18, 2011.

# CEO FORUM

FOR HIGH ASSET CREDIT UNIONS

## Agenda at-a-Glance

### Wednesday, August 17th

- 3:00-4:00 PM: Registration
- 4:00-6:00 PM: **CEO Panel Discussion**
- 6:30-7:15 PM: Welcome Reception (*Guests Included*)
- 7:15 PM: Dinner (*Guests Included*)

### Thursday, August 18th

- 8:00-9:00 AM: Breakfast (*Guests Included*)
- 9:00-9:10 AM: Opening Remarks, Bob Dye
- 9:10-10:30 AM: **Cognitive Neuroscience of Financial Decisions**, presented by David Eagleman
- 10:30-10:45 AM: Morning Break
- 10:45-12:00 PM: **Collaboration: Leveraging the Power of Community**, presented by Louis Hernandez, Jr.
- 12:00-1:00 PM: Lunch (*Guests Included*)
- 1:00-2:15 PM: **Emerging Trends in Payments**, presented by Terrence Roche
- 2:15-3:30 PM: **THE UGLY, BAD and GOOD – Impacting Credit Union Scenarios in a Decade of Change**, presented by Dennis Dollar
- 3:30-3:45 PM: Break
- 3:45-5:00 PM: **Key Traits of High Performing Credit Unions**, presented by Bill Handel
- 5:00-5:15 PM: Closing Remarks, Bob Dye
- 6:30-7:15 PM: Reception (*Guests Included*)
- 7:15 PM: Crystal Performance Awards Dinner (*Guests Included*)

### Friday, August 19th

- 7:00 AM: Optional Round of Golf at Monarch Beach Golf Links (*Guests Included*). Tee times begin at 7:00 a.m. and will extend through the late morning based on availability. Please contact Dan McGowan to join us for a round of golf.