

2009

CUNA ECONOMICS & INVESTMENTS CONFERENCE

Understand the forces shaping the economy.

.....
AUGUST 2-5, 2009 · SAN DIEGO, CA
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**PRE-CONFERENCE WORKSHOP: INTRODUCTION TO
CREDIT UNION ALM & THE ECONOMY**

AUGUST 2, 2009 · SAN DIEGO, CA

Register at: training.cuna.org



Your Trusted Resource

**Professional
Development**

2009

CUNA ECONOMICS & INVESTMENTS CONFERENCE

AUGUST 2-5, 2009 • SAN DIEGO, CA
TUITION: \$1,095 (\$1,195 after June 19, 2009)

Pre-Conference Workshop: Introduction to Credit
Union ALM & the Economy
AUGUST 2, 2009 • SAN DIEGO, CA

Who should attend?

This conference is designed for staff at all levels of credit union management and volunteers who wish to develop expertise in economics and investments. Past attendees have included CEOs, board members, CFOs, financial and investment officers, operations staff, investment committee members, league staff, and corporate credit union staff.

Every day brings more news about the government's efforts to fix the economy, how will the U.S. economy respond? When will the recovery happen and what can credit unions do to revitalize a stagnant economy?

Although consumers are borrowing less and the market is slowing, this doesn't mean credit unions can't grow their business. Understand the forces shaping the economy and gain practical ideas for managing your credit union's investments. Register now to develop insights on how opportunities and risks in the current economic environment will affect how you do business.

Attend this conference to:

- Learn about the key factors shaping the U.S. economy
- Obtain practical tools for managing your credit union's finances
- Gain investment strategies to keep your credit union competitive
- Develop your asset-liability management techniques
- Understand current regulatory issues that affect your credit union's investment options

Register at training.cuna.org and choose *Schools & Conferences*.

100%
GUARANTEE

CUNA Center for
Professional Development
is committed to providing a quality
learning experience with cutting-edge
topics and expert instructors.
If for some reason you are not
fully satisfied, contact us and
we'll provide you a full
tuition refund or credit.

Experience Learning like never before with CUNA Center for Professional Development. For more than 40 years, we've helped people reach their personal and professional potential to maximize credit union performance. With training designed for credit unions by credit union people, our content is second to none and our business results help credit unions thrive. We deliver expert information, resources, and networking opportunities that inform and motivate staff and volunteers to deliver innovative ideas and exceptional strategies to your credit union. **Guaranteed.**

Bring a Guest!

While you're attending the conference, your guest may enjoy San Diego and the Gaslamp district. Our guest program includes Sunday's reception, Monday's lunch, and three breakfasts.

August 2-5, 2009 \$199

Sunday

8:00-9:00 a.m.

Continental Breakfast

1:30-2:45 p.m.

Mortgages & the Road to Recovery

1:00-2:00 p.m.

Interest Rate Risk? Policies & Strategies in a Low Rate Environment

8:30-9:00 a.m.

Pre-Conference Registration

- Review the state of the housing market and mortgage industry
- Explore the housing market outlook and how mortgage lending trends will factor into your credit union's future success

- Hear strategies to develop a plan that will meet member needs while controlling exposure to changing market interest rates

9:00 a.m.-1:00 p.m.

Pre-Conference Workshop:
Introduction to Credit Union ALM & the Economy
(additional \$395/participant)

2:30-3:30 p.m.

ALM Hot Topic: Deposit Account Strategies

4:30-6:00 p.m.

Conference Registration & Welcome Reception

- Learn how liability management techniques can provide stability and reduce your risk profile

Monday

7:30-8:30 a.m.

Continental Breakfast

3:15-4:30 p.m.

The New Federal Reserve Policies & Their Impact on the Economy

8:15-8:30 a.m.

Welcome & Orientation

- Review recent Federal Reserve activities
- Learn about some of the new tools the Fed has used to steer the economy

3:30-4:30 p.m.

Optimal Investments Strategies

8:30-10:00 a.m.

Roadmap to Recovery

- Review economic trends and current indicators
- Find out how the economic climate will change

- Review investment strategies that will help boost bottom-line results in the current environment

10:15-11:30 a.m.

Impact of the U.S. Economy on Credit Unions

- Discover how changing economic conditions are going to influence member behavior
- Identify credit union strategies to effectively respond to economic challenges

Tuesday

7:30-8:30 a.m.

Continental Breakfast

Finance Face-Off

- Listen and learn as CUNA economists debate the latest hot button issues

Wednesday

7:30-8:30 a.m.

Continental Breakfast

NCUA Forecast

- Explore how the regulatory landscape will influence your operations
- Learn what CUNA is doing to mitigate the effects of regulatory changes

8:30-10:00 a.m.

10:15-11:30 a.m.

CFO Forum

- Hear industry leaders discuss their investment and operational responses to current challenges

8:30-9:30 a.m.

9:45-11:00 a.m.

Designing the Action Plan

- Learn how to make a difference at your credit union with a solutions action plan

11:30 a.m.-12:30 p.m.

Networking Lunch Provided

11:30 a.m.-1:00 p.m.

Lunch on Your Own

12:30-1:30 p.m.

Preparing Your Credit Union for the Changes in the Auto Industry

- Review auto industry trends
- Explore the future of the automobile industry and auto finance

Schedule is subject to change.

WHAT PAST ATTENDEES SAY



“Great insight into the current economic trends as well as a forecast into the future.”

“I thought that it was a series of very useful, insightful, and balanced presentations covering a broad range of need-to-know topics.”

“I am a financial advisor by trade and possess a great deal of knowledge in this area, but am always looking to expand that knowledge base. It was a conference that would benefit our members, my clients, and me—as a board member and financial advisor— by my attendance. I truly enjoyed it and plan to return next year.”

“I depend on this conference every year to bring me up-to-date and challenge me with varying ideas.”



PRE-CONFERENCE WORKSHOP: INTRODUCTION TO CREDIT UNION ALM & THE ECONOMY

AUGUST 2, 2009 · SAN DIEGO, CA
TUITION: \$395

Join us for this half-day workshop on key financial components that all credit union staff and board members should understand. Take a guided tour through asset-liability management (ALM) and economic issues for credit unions. Practice making decisions for your credit union based on different scenarios that are affected by economic trends.

Class Schedule

8:30 – 9:00 a.m.

9:00 a.m. – 1:00 p.m.

Registration

**Introduction to
Credit Union ALM
& the Economy**

Register at: training.cuna.org
and choose *Schools & Conferences*.



Earn credit toward your Certified Credit Union Volunteer designation. By successfully completing the Introduction to Credit Union ALM & the Economy Pre-Conference Workshop and optional exam, you can earn 4 credits for the CUNA Volunteer Certification Program (Level 2, Safety & Soundness).

Register at: training.cuna.org
and choose *Schools & Conferences*.

MEET THE SPEAKERS



Bill Hampel is senior vice president of the research and policy analysis department and chief economist for CUNA. He joined the department as an economist in 1978 and was promoted to vice president in 1985. Bill was appointed senior vice president in 1992. He also writes economic analysis columns for several credit union publications.



Steve Rick is a senior economist for CUNA. He conducts economic research, teaches at various credit union schools and conferences, and writes articles for CUNA publications. Steve facilitates strategic planning sessions for credit union boards and has authored a textbook on asset-liability management. Steve is also a faculty member of the economics department at the University of Wisconsin-Madison.



Mike Schenk is vice president of economics and statistics for CUNA. He conducts economic and financial research and provides support for CUNA Governmental Affairs and Public Relations efforts. His analyses regularly appear in CUNA publications. Mike has 20 years of experience in the financial services industry. Before joining CUNA in 1992, he was the director of research for Financial Research Corporation, where he conducted economic analyses, competitor evaluations, and product-line planning for mutual fund companies.

STAY IN BEAUTIFUL SAN DIEGO!



San Diego Marriott Gaslamp Quarter

660 K Street

San Diego, CA 92101

Phone: 619-696-0234

Fax: 619-231-8199

Reservations: 800-228-9290

Room rates: \$219 single/double*

Hotel Reservation Deadline: July 10, 2009

The San Diego Marriott Gaslamp Quarter hotel is located in the historic Gaslamp district. This Luxury San Diego Hotel is adjacent to PETCO Park, two blocks from the San Diego Convention Center, and within walking distance to shopping at Horton Plaza or Seaport Village, with the San Diego Airport only three miles away.

**Room rates and availability cannot be guaranteed. Rooms may be sold out prior to this date, so make your hotel reservations early! Room reservations and fees are the responsibility of the registrant. To claim this room rate, call for reservations and reference "CUNA" or "Credit Union National Association."*

2009

CONFERENCE INFORMATION

FOR MORE INFORMATION: training.cuna.org

Program Content:

Call: 800-356-9655, ext. 4249 • E-mail: training@cuna.coop

Registration:

Call: 800-356-9655, ext. 4400 • E-mail: reginfo@cuna.coop

CONTINUING PROFESSIONAL EDUCATION (CPE) CREDITS

CUNA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Web site: www.nasba.org.



CPE Credits

You can earn 4 group-live CPE credit hours for the CUNA Pre-Conference Workshop: Introduction to Credit Union ALM & the Economy and 17 group-live CPE credit hours for the CUNA Economics & Investments Conference. No advance preparation or prerequisites are required. For more information regarding administrative policies, such as complaint and refund, please contact CUNA at 800-356-9655, ext. 4249.

COUNCIL DISCOUNT

CUNA Council members receive a \$100 discount on select schools and eSchools and a \$50 discount on webinars. To learn more about CUNA Councils, visit cunacouncils.org.

TRAVEL ARRANGEMENTS

United Airlines is the "Official Airline" for the programs. To make reservations, visit www.united.com or call United's Specialized Meetings Reservation Center at (800) 521-4041. Please reference ID# 553SF.

CANCELLATIONS & REFUNDS

Cancellations received in writing (via fax 608-231-4327) seven or more days before the start of the program are eligible for a refund of the amount paid minus a \$200 administrative fee. No refunds will be granted if cancellation is received six days or less before a program begins. Substitutions are accepted anytime prior to the start of the program at no additional cost. Simply fax an updated registration form, listing the new participant and who they will be replacing.

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and choose *Schools & Conferences*.

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POWERED BY CUNA

America's Credit Union Conference & Expo

When the Great Depression gripped the nation, it was the credit union revolution that helped pull people through. Since then, the tireless evolution of credit unions has kept the movement strong. Celebrate 100 years of America's credit unions and gain the ideas you need to set a positive course for the future. Register now at acuc.cuna.org.

June 21-24, 2009 · Boston, MA

Tuition: \$895 (\$450 for CUs under \$35 million)

CUNA Community Credit Union & Growth Conference

This is a must attend event whether your credit union is considering a community charter or has held one for years. You'll discover new strategies for growing membership and serving emerging markets. The Community Credit Union of the Year Awards are presented at the conference.

October 21-24, 2009 · Las Vegas, NV

Tuition: \$895

Comprehensive and flexible credit union training at your fingertips!

CPDOnline provides interactive courses and follow-up exams designed to help credit union staff, volunteers, and managers build skills and develop their careers. More than 20 accounting, budgeting, business math, and finance courses are offered including Asset-Liability Management for Executives, Financial Analysis Tools for Decision Making, and Reconciling Records. Just \$35 for each **CPD**Online course! Visit training.cuna.org and choose **CPD**Online.

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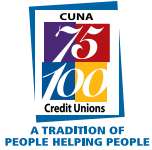
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Credit Union National Association

PO Box 431 | Madison, WI 53701-0431



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