

2020 NAFCU CONFERENCE AND ONLINE TRAINING LINEUP

53rd Annual Conference and Solutions Expo in Vancouver, Canada ▼



GO BEYOND



Open to everyone. Special rates for members!
nafcubank.com/2020training | 800.344.5580



GO BEYOND

You're all about getting to the next level—for both yourself and your credit union. We'll power your way by giving you the best education and compliance assistance available. With NAFCU's 2020 credit union training, you'll become even more adept at building revenue, streamlining costs, strategizing effectively, and eliminating compliance headaches. Discover the new ideas and stronger connections to keep yourself ahead—and your credit union growing. Take advantage of our 2020 conference and online training lineup now.

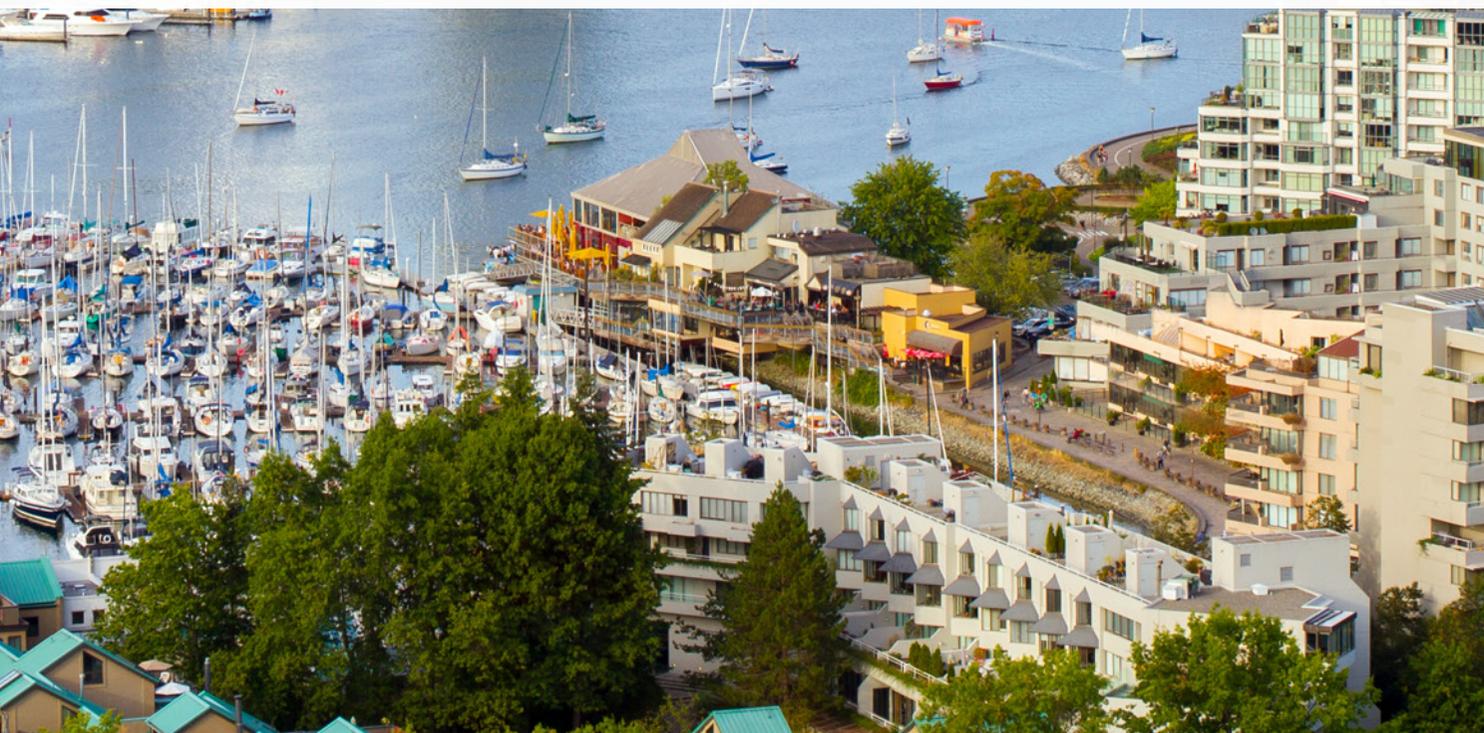


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FIND TRAINING FOR YOUR ROLE



**Board &
Supervisory
Committees**



**Compliance,
Risk & BSA**



**Executive
Leadership**



**Growth &
Marketing**



Operations

**Quickly discover the specific training you need.
Visit nafcu.org/CUrole.**

NAFCU Online Training Center



NAFCU TRAINING AVAILABLE WHENEVER AND WHEREVER YOU NEED US

Your entire credit union can access our online training for just one price. Gain knowledge from individual live or on-demand webinars that focus on the industry's most pressing issues. Or take advantage of one of our training subscriptions to benefit from a full year of NAFCU's online training!

Benefits:

- › Give new and seasoned board members, compliance staff and others essential training specific for their roles
- › Keep your designations current with credits towards maintaining NAFCU and NASBA certifications
- › Harness NAFCU's trusted expertise wherever you are
- › Eliminate travel time and reduce costs associated with training

Who Should Watch:

- CEOs and presidents
- C-level executives
- Board members
- New hires
- Compliance, risk, audit, and fraud staff

nafcu.org/onlinetraining20
800.344.5580

GET IT ALL FOR ONE LOW PRICE

NAFCU All-Access Pass

The All-Access Pass to NAFCU's Online Training Center provides your entire credit union with a full year of access to the complete suite of online training. Take total advantage of the ultimate online education resource. Save time and save money!

Receive:

- › Online Compliance Training
- › Board of Directors Online Training
- › **Bonus!** Management and Leadership Series Training with John Spence

Starts at \$2,699 | Get a custom quote at nafcuboard.org/onlinequote20

nafcuboard.org/allaccess20

MASTER THE MOST CHALLENGING AREAS OF COMPLIANCE

NAFCU Online Compliance Training Subscription

Stay up-to-date on evolving compliance rules while acing the most daunting regulations. For just one price your entire credit union will be able to master challenges like BSA, cybersecurity, risk management, loss prevention, and more. Don't let compliance trip you up.

Starts at \$2,599 | Get a custom quote at nafcuboard.org/onlinequote20

nafcuboard.org/complianceonline20

GIVE YOUR BOARD A FULL UNDERSTANDING OF THEIR ROLE

NAFCU Board of Directors Online Training Subscription

Build your board members' skills fast, whether they're new or seasoned. They'll come away with a comprehensive understanding of BSA, credit union governance, fiduciary duties, and what issues they should be watching out for. Board members can even earn their NAFCU Certified Volunteer Expert (NCVE) designation with the included online exam.

Includes a free e-version of our best-selling Credit Union Director Handbook written by NAFCU EVP and COO Anthony Demangone.

Starts at \$699 | Get a custom quote at nafcuboard.org/onlinequote20

nafcuboard.org/boardonline20

2020 NAFCU STRATEGIC GROWTH CONFERENCE

March 2 - 4, 2020
San Antonio, TX



FUTURE-FACING STRATEGIES TO INTENSIFY YOUR GROWTH

This conference will give you tools and insight for how to help your credit union be the best financial institution, period. You'll walk away with leading strategies and real-world examples for driving growth, staying relevant now and in the future, and outperforming your competition. If you thirst for what's next so your credit union can thrive, this is the perfect conference for you.

Benefits:

- › Attract new members by utilizing new credit union technology to leverage FinTech and payments
- › Rejuvenate your credit union with strategies that re-engage new and current members, from data analytics to generational advertising
- › Boost share-of-wallet by learning best practices from leading credit unions—from successful brand strategies to finding the right balance between branch and digital services
- › Propel revenue by gaining a view into the future of financial services and what you need to do now to better position your credit union to take advantage
- › Network with like-minded credit union peers that are executing innovative growth strategies and looking for what's next on the horizon

Who Should Attend:

- Marketing, business development, e-commerce, lending, and operations staffs
- C-level executives

Registration starts at \$1,249 when you save \$200 with code **GROWTHSAVINGS** by January 17, 2020.

nafcu.org/growth20
800.344.5580



NAFCU's 2019 Credit Union Compliance GPS manual is here!

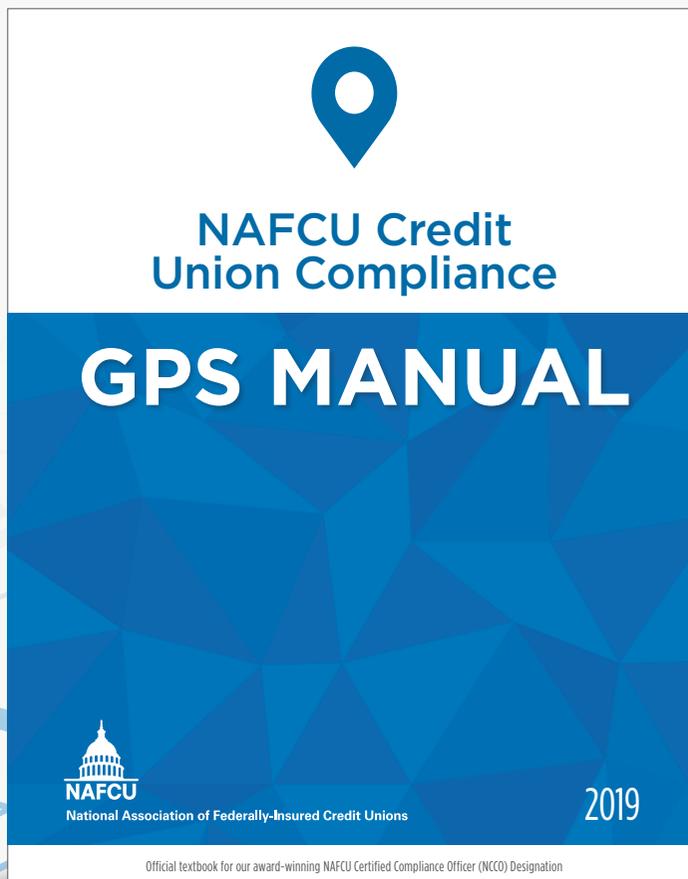
A must-have, electronic resource that explains complex regulatory language in plain English including, specifics of the NCUA, CFPB, and important credit union federal regulations.

New in 2019: S.2155 Amendments, Field of Membership, Privacy, TCPA and more!

Available to all industry professionals
NAFCU members - \$399 | Nonmembers - \$499

www.nafcu.org/gps19

Looking for the 2020 version? Our next annual update will be ready this April!



SPRING 2020 NAFCU REGULATORY COMPLIANCE SCHOOL

March 16 - 20, 2020
Arlington, VA



“ I now have a more thorough and holistic perspective on keeping my CU compliant, and it’s due to attending NAFCU’s Regulatory Compliance School. Thank you! ”

Scott Loftin, NCCO Compliance Manager, Credit Human FCU



EARN YOUR AWARD-WINNING CERTIFICATION IN COMPLIANCE FROM A TO Z



Earn the prestigious NAFCU Certified Compliance Officer (NCCO) designation by passing all four required exams. Current NCCOs will earn all 24 credits needed for recertification.

Registration starts at \$1,949 when you save \$200 with code **SCHOOLSAVINGS** by January 24, 2020 (March in Arlington) or **SUMMERSAVINGS** by June 5, 2020 (July in Salt Lake City).



SUMMER 2020 NAFCU REGULATORY COMPLIANCE SCHOOL

July 27 - 31, 2020
Salt Lake City, UT

2 LOCATIONS AND DATES!

This conference is the backbone of your compliance training knowledge. Every department touches compliance, so it's vital you have a solid understanding of the core regulations and laws that impact your operations.

Benefits:

- › Gain a thorough understanding of foundational compliance knowledge
- › Find out how to efficiently research new compliance changes
- › Network with NAFCU's regulatory counsels and compliance officers from around the nation
- › Prepare your credit union for what's coming next with a day dedicated to regulatory updates
- › **Receive a free e-copy of our 2020 Credit Union Compliance GPS** that breaks down complex regulatory language into easy-to-understand terms

Who Should Attend:

- Compliance staff and others who work closely with compliance

nafcu.org/school20
800.344.5580

20|BOD

NAFCU Board of Directors and
Supervisory Committee Conference
+ Certification

April 27 - 30, 2020
San Francisco, CA



DEVELOP MORE EFFECTIVE BOARD AND SUPERVISORY SKILLS

Set the tone for your credit union's success. You'll get a current view of the industry, regulations, technology and more—all so you can execute your responsibilities even more efficiently and effectively.

Benefits:

- › Achieve NAFCU Certified Volunteer Expert (NCVE) certification by passing the exam after the optional, free pre-conference workshop. Or recertify just by attending the conference!
- › Earn NAFCU training certificates in financial literacy, supervisory committee know-how, and the Bank Secrecy Act (BSA)
- › Acquire critical knowledge to protect and empower yourself in your role
- › Gain up-to-date information on how regulations, policies, technology and more are impacting the credit union industry
- › Discuss succession planning, overcoming common board and supervisory pitfalls and millennial engagement at the board level
- › Expand your network of fellow board and supervisory committee members

Who Should Attend:

- Exclusively for volunteer officials

Registration starts at \$1,549 when you save \$200 with code **BOARDSAVINGS** by March 6, 2020.

nafcu.org/board20
800.344.5580



20|CEO

NAFCU CEOs & Senior Executives
Conference

May 6 - 8, 2020
Palm Springs, CA

DISCUSS, DIRECT AND DRIVE THE FUTURE OF OUR INDUSTRY

This is the event for top-level credit union executives to come together for candid conversation with fellow industry leaders. Take a seat at the table by defining the issues and agenda credit unions—and NAFCU—should follow in order to pave the path for growth and success in today’s and tomorrow’s financial services realm. Your feedback is a powerful platform to help us drive the direction of our industry. All in an ideal environment for top credit union leaders to problem-solve, re-energize, and network.

Benefits:

- › Recharge and reinvigorate with fresh ideas, perspectives, and a vision for the future of credit unions
- › Drive the direction of NAFCU and the industry with a seat at the table for an intimate discussion of developing issues and what’s next for our industry
- › Gain clear, concise “inside insights” from NAFCU President and CEO Dan Berger and our government affairs team
- › Engage in real-time polling to drive the discussion and truly customize your experience by addressing what’s top-of-mind for *you* in 2020
- › Take advantage of intimate conversations, top-notch networking and interactive working sessions with other credit union CEOs and executive teams, as well as NAFCU’s board and executive team

Who Should Attend:

- CEOs
- C-level executives

Registration starts at \$1,149 when you save \$200 with code **CEOSAVINGS** by March 13, 2020.

nafcu.org/executive20
800.344.5580



53rd Annual Conference and Solutions Expo

June 23 - 26, 2020
Vancouver, Canada



MEGATRENDS AND TOOLS TO STRENGTHEN YOUR LONG-TERM SUCCESS

Discover mega trends in the most important topics affecting credit unions, so your board and executive team can implement the most successful 5-year growth plan possible. You'll receive updates, ideas and best practices, all from a robust network of experts and peers who'll help you make a solid plan for the future. This program is designed for your leadership team and board to learn, workshop and strategize together. We'll even help you reserve space to hold meetings during the week! All in the vibrant city Condé Nast Traveler ranked one of the Best Cities in the World for two years running.

“NAFCU's Annual Conference & Solutions Expo is a top notch event from beginning to end. Thank you for providing the information we need, right when we need it!”

Diana Veazey, *President/CEO, LG&W FCU*

Who Should Attend:

- CEOs
- Volunteer officials
- C-level executives and VPs

Registration starts at \$1,349 when you save \$200 with code **ANNUALSAVINGS** by May 1, 2020.



Benefits:

- › Boost your knowledge of trends in disruptive technology, big data, brand development, retail delivery, cybersecurity, payments, regulatory compliance and more
- › Enhance your strategic plan with action planning sessions that deliver the newest ideas and tools you need to be successful for years to come
- › Discover how to increase transparency and simplify analytics to make data-driven decisions
- › Uncover the important questions that will propel your credit union to a higher level of performance
- › Connect with peers for valuable insights during fantastic networking opportunities
- › Position your credit union for the future with the latest in game-changing technologies from today's most trusted solutions experts
- › Achieve NAFCU Certified Volunteer Expert (NCVE) certification by passing the exam after the optional pre-conference workshop (additional fees apply)

nafcubank.org/annual20
800.344.5580

2020 NAFCU BSA SCHOOL

July 27 - 29, 2020
Salt Lake City, UT



BOOST YOUR BSA KNOWLEDGE AND EARN YOUR CERTIFICATION

Gain a solid understanding of the core Bank Secrecy Act regulations impacting your operations, so your credit union's BSA/AML program is up to the challenge of identifying and stopping money laundering. This school is designed around mastering the unique BSA/AML challenges credit union professionals face every day.

Benefits:

- › Build a toolkit of strategies to best coordinate and monitor the five pillars of BSA/AML compliance
- › Demonstrate to NCUA and FinCEN that you're dedicated to protecting your credit union against money laundering threats
- › Earn NAFCU's Certified Bank Secrecy Officer Manager (NCBSO) designation when you take and pass the optional certification exam (additional fee applies)
- › Build a network of nationwide BSA professionals

NCBSO

Already have your NCBSO? Earn all the CEUs needed to recertify by attending Regulatory Compliance Seminar's new BSA track! See page 16 for more.

Who Should Attend:

- Staff responsible for BSA/AML, audit, and fraud
- Compliance staff

Registration starts at \$1,949 when you save \$200 with code **BSASAVINGS** by June 5, 2020.

nafcu.org/bsa20
800.344.5580



2020 NAFCU CONGRESSIONAL **CAUCUS**

September 13 - 16, 2020
Washington, DC

SUPPORT CREDIT UNIONS AT THE INDUSTRY'S MOST INTIMATE ADVOCACY EVENT

In today's uncertain political environment, you can make more of a difference than ever. Protect your members by advocating on their behalf on Capitol Hill. Your insights will help Congress understand why and how it needs to act against harmful regulatory burdens and make sure credit unions have a seat at the table when determining future laws that govern our industry. We make it easy by offering you the most personal access to lawmakers and regulators of any credit union advocacy event.

Benefits:

- › Strengthen your techniques for communicating credit union issues to Congress
- › Represent your members by telling their stories on Capitol Hill
- › Lobby Congress for regulatory relief, enhanced merchant data security standards, and more
- › Get invaluable one-on-one time with NAFCU's leadership and Government Affairs staff
- › Enhance your network of credit union advocates and Capitol Hill connections at special events inside Congress' inner halls and other D.C. venues

Who Should Attend:

- CEOs
- C-level executives and VPs
- Volunteer officials
- Government affairs and community relations staff

Registration starts at \$949 when you save \$200 with code **CAUCUSAVINGS** by July 20, 2020.

nafcu.org/caucus20
800.344.5580

2020 NAFCU MANAGEMENT & LEADERSHIP INSTITUTE

September 28 -
October 2, 2020
Annapolis, MD



ADVANCE YOUR CAREER AS A CREDIT UNION LEADER FASTER

Take your career as a credit union leader to the next level. This intensive, five-day program will position you to lead your credit union into the future. You'll learn exactly what you need to be a highly successful leader who has what it takes to run a successful credit union.

Benefits:

- › Get a solid understanding of credit union financial management, including accounting cost analysis
- › Expand your skills outside your job role by learning what a credit union leader should know about operations, marketing, compliance, and more
- › Gain tools to move projects forward and develop a high-performing team
- › Learn how to think like a credit union CEO and what traits and behaviors make outstanding leaders

Who Should Attend:

- Senior and mid-level management
- Branch and operations managers
- Anyone who aspires to credit union leadership

Registration starts at \$1,949 when you save \$200 with code **MLISAVINGS** by August 3, 2020.

nafcu.org/management20
800.344.5580



2020 NAFCU LENDING CONFERENCE

October 19 - 21, 2020
San Diego, CA

CREATE NEXT-LEVEL LENDING SUCCESS

Learn everything you need to build a flourishing lending portfolio. The industry's most successful lenders will provide you with best practices, ideas, strategies and tactics. It's the perfect event to jump-start and maximize your portfolio.

Benefits:

- › Discover the latest and most promising trends in lending products and services
- › Connect with and learn from credit union peers who've built prosperous lending portfolios
- › Understand how to better capture new audiences, including millennials
- › Utilize powerful mortgage, credit card, business and auto lending strategies
- › Sharpen your edge over traditional and online competitor products

Who Should Attend:

- Lending, marketing, e-commerce, and business development staffs
- Senior management

Registration starts at \$1,449 when you save \$200 with code **LENSAVINGS** by August 21, 2020.

nafcu.org/lend20
800.344.5580

2020 NAFCU RISK MANAGEMENT SEMINAR + CERTIFICATION

October 27 - 29, 2020
Atlanta, GA



IDENTIFY, MEASURE AND MASTER RISK

Credit union risks are evolving; your risk management training should evolve too. Understand and prepare for the most serious internal and external threats facing your credit union, from interest rate risk to compliance, strategic, credit and reputational risks. This is an essential conference for you to acquire current risk management methodologies and implementation best practices, so you can help keep your credit union safe.

Benefits:

- › Heighten your understanding of enterprise risk management (ERM) methodology and NCUA's growing emphasis on risk
- › Gain insights and best practices from peers and industry insiders who've successfully implemented ERM
- › Experience hands-on learning so you can better implement a risk management program unique to your credit union
- › Earn NAFCU's Certified Risk Manager (NCRM) designation when you take and pass the optional certification exam
- › Build a strong network of credit union risk professionals from around the country

Who Should Attend:

- CEOs
- C-level executives and VPs
- Risk, audit, and senior compliance staff

Registration starts at \$1,549 when you save \$200 with code **RISKSAVINGS** by August 28, 2020.

nafcu.org/risk20
800.344.5580



2020 NAFCU REGULATORY COMPLIANCE SEMINAR

October 27 - 30, 2020
Atlanta, GA

SHARPEN YOUR COMPLIANCE AND BSA KNOWLEDGE

Stay on top of evolving regulatory trends and hot topics so you fully understand the new and developing landscape around you.

Benefits:

- › Learn how to conquer the latest compliance and BSA challenges, and discuss your specific issues face-to-face with industry experts
- › Earn all the CEUs needed for recertification of our prestigious, award-winning NAFCU Certified Compliance Officer (NCCO) designation
- › **New!** Attend the BSA sessions to earn all the CEUs needed to recertify your NAFCU Certified Bank Secrecy Officer (NCBSO) designation
- › Gain insight from the most up-to-date breakdowns of money laundering threats
- › Expand your network of credit union compliance professionals, attorneys and experts

Who Should Attend:

- NCCOs and NCBSOs
- Compliance, audit and legal staff

Registration starts at \$1,649 when you save \$200 with code **SEMINARSAVINGS** by August 28, 2020.

nafcu.org/seminar20
800.344.5580

20|CFO

NAFCU Credit Union CFO Summit

December 9 – 10, 2020
Ft. Lauderdale, FL



SECURE THE SOLUTIONS YOU NEED TO ACHIEVE SUCCESS

As a CFO you hold special responsibility for helping steer your credit union towards its goals. Join us to take advantage of the actionable information, best practices and stronger connections you need to advance your credit union even further.

Benefits:

- › Strengthen your understanding of the latest industry, economic and regulatory data trends affecting your day-to-day role
- › Acquire best practices to help you develop strategy, minimize risk, and advance your career
- › Overcome your biggest challenges by uncovering strategies to fight fraud, prepare for new examination procedures and more
- › Earn CPE credits towards maintaining your CPA
- › Build a stronger network of industry peers from across the country

Who Should Attend:

- CFOs
- Controllers
- VPs of Finance

Registration starts at \$749 when you save \$200 with code **CFOSAVINGS** by October 9, 2020.

nafcu.org/cfo20
800.344.5580



The perfect electronic resource
to help CU compliance staff with
their day-to-day job functions.

TAKE YOUR KNOWLEDGE AND CAREER TO THE NEXT LEVEL WITH NAFCU'S INDUSTRY-LEADING CERTIFICATIONS

NAFCU Certified Compliance Officer (NCCO)

Pass a series of four examinations to show you have a comprehensive understanding of the major regulations that govern credit union operations, and show regulators you're dedicated to excellence in compliance.

Available at:

› **Regulatory Compliance School**

nafcu.org/ncco20

Recertify with:

› **Regulatory Compliance School**

› **Regulatory Compliance Seminar**

› **Online Compliance Training Subscription**

AWARD WINNING

NCCO
PROGRAM



NAFCU Certified Bank Secrecy Officer (NCBSO)

Pass one examination to show you're prepared to protect your credit union against money laundering threats, and show regulators you're dedicated to BSA compliance.

Available at:

› **BSA School**

nafcu.org/ncbso20

Recertify with:

› **Regulatory Compliance Seminar**

› **Online Compliance Training Subscription**

NCBSO

NAFCU Certified Risk Manager (NCRM)

Pass one examination to show you understand credit union enterprise risk management (ERM) methodology and NCUA regulatory requirements for risk.

Available at:

› **Risk Management Seminar**

nafcu.org/ncrm20

Recertify with:

› **Risk Management Seminar**

› **Online Compliance Training Subscription**

NCRM

NAFCU Certified Volunteer Expert (NCVE)

Pass one examination to show you have a comprehensive understanding of your credit union volunteer role and how the credit union system works.

Available and recertifiable with:

› **Board of Directors and Supervisory Committee Conference**

› **53rd Annual Conference & Solutions Expo**

› **Board of Directors Online Training Subscription**

nafcu.org/ncve20

NCVE

EASY BUDGETING GUIDE

Recommended Training by Title and Role

CEOs and Executive Team

Starts At *(With Promo Code)*

› Strategic Growth Conference	\$1,249
› CEOs and Senior Executives Conference	\$1,149
› 53rd Annual Conference and Solutions Expo	\$1,349
› Congressional Caucus	\$949
› Risk Management Seminar	\$1,549
› Credit Union CFO Summit	\$749

Senior Management

› Strategic Growth Conference	\$1,249
› 53rd Annual Conference and Solutions Expo	\$1,349
› Congressional Caucus	\$949
› Management and Leadership Institute	\$1,949
› Lending Conference	\$1,449
› Risk Management Seminar	\$1,549

Board and Supervisory Committee Members

› Board of Directors Online Training Subscription	\$699*
› Board of Directors and Supervisory Committee Conference	\$1,549
› 53rd Annual Conference and Solutions Expo	\$1,349
› Congressional Caucus	\$949

Marketing, Lending and e-Commerce Staff

› Strategic Growth Conference	\$1,249
› Management and Leadership Institute	\$1,949
› Lending Conference	\$1,449

Compliance and Risk Staff

› Online Compliance Training Subscription	\$2,599*
› Regulatory Compliance School	\$1,949
› BSA School	\$1,949
› Management and Leadership Institute	\$1,949
› Risk Management Seminar	\$1,549
› Regulatory Compliance Seminar	\$1,649

*No early bird promo code for online training

**Quickly discover the specific training you need.
Visit nafcu.org/CUrole.**



**National Association of
Federally-Insured Credit Unions**
3138 10th Street North
Arlington, VA 22201-2149

NAFCU | Your Direct Connection to Federal Advocacy, Education & Compliance

“ Once again we came away with a wealth of knowledge. We appreciate and value NAFCU for the advocacy, education and support your team gives us. ”

BROWN SIMPSON, JR.

*Chairman of the Board of Directors,
Family Trust FCU*

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Open to everyone. Special rates for members!
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