

2022




National Association of
Federally-Insured Credit Unions

KEEP PUSHING FORWARD

Conference & Online Training Lineup

OUR ANNUAL CONFERENCE IS BACK,
IN PERSON. **SEE YOU IN MONTREAL!**

A silhouette of a person running on a rocky path against a blue sky. The person is captured in mid-stride, with their right leg forward and their left leg pushing off. The background is a gradient of blue, suggesting a clear sky. The overall mood is one of determination and forward movement.

KEEP PUSHING *FORWARD*

You're continuing to push your credit union forward during these uncertain times. We'll help you power your way through by giving you the best education and compliance assistance available. With NAFCU's 2022 credit union training, you'll become even more adept at increasing growth, streamlining costs, strategizing effectively, and strengthening your member service culture. Discover new ideas and strategies to keep pushing yourself and your credit union forward. Take advantage of our 2022 conference and online training lineup now.

TABLE OF CONTENTS

| | |
|---|----|
| NAFCU Online Training Center..... | 3 |
| Virtual BSA School | 6 |
| Regulatory Compliance School..... | 8 |
| Strategic Growth Conference | 9 |
| Board of Directors and Supervisory Committee Conference | 11 |
| CEOs and Senior Executives Conference..... | 12 |
| 55th Annual Conference and Solutions Expo | 14 |
| Virtual Risk Management Seminar..... | 15 |
| Congressional Caucus..... | 17 |
| CFO Summit..... | 20 |
| Regulatory Compliance & BSA Seminar..... | 21 |
| Management & Leadership Institute | 22 |
| Lending Conference..... | 23 |
| NAFCU Certifications..... | 25 |
| Easy Budgeting Guide..... | 26 |

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 you can take advantage of one of our training subscriptions to benefit from online NAFCU training for a full year!

Benefits:

- › Give new and seasoned board members, compliance staff and others essential training specific for their roles
- › Keep your knowledge at the next level with CEUs toward maintaining NAFCU and NASBA certifications
- › Harness NAFCU's trusted expertise wherever you are
- › Eliminate travel time and reduce costs associated with training



nafcu.org/onlinetraining22
800.344.5580

NAFCU All-Access Pass

Starts at \$2,699 | Get a custom quote at nafcu.org/onlinequote22

Get It All for One Low Price

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. Now you can 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

nafcu.org/allaccess22 | 800.344.5580

NAFCU Online Compliance Training Subscription

Starts at \$2,599 | Get a custom quote at nafcu.org/onlinequote22

Master the Most Challenging Areas of Compliance

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, business continuity, cybersecurity, risk management, loss prevention, and more. Don't let compliance issues trip you up.

nafcu.org/complianceonline22 | 800.344.5580

NAFCU Board of Directors Online Training Subscription

Starts at \$699 | Get a custom quote at nafcu.org/onlinequote22

Give Your Board a Full Understanding of Their Role

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.

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

nafcu.org/boardonline22 | 800.344.5580



If it impacts your CU, it's in *NAFCU Today*.

The daily news you need from Washington D.C.



nafcu.org/subscribe

VIRTUAL BSA SCHOOL

Virtual Event | February 8 - 10, 2022

BOOST YOUR BSA KNOWLEDGE AND EARN YOUR CERTIFICATION

For BSA/AML, audit, fraud and compliance staff

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 combating money laundering. This school is designed around mastering the unique BSA/AML challenges credit union professionals face every day.

- › 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 and the U.S. financial system against money laundering and anti-terrorist financing threats
- › Earn NAFCU's Certified Bank Secrecy Officer (NCBSO) designation when you take and pass the optional certification exam (additional fee applies)
- › Build a network of nationwide BSA professionals

Already have your NCBSO? Earn all the CEUs needed to recertify by attending the BSA track at Regulatory Compliance & BSA Seminar!



nafcu.org/bsa22 | 800.344.5580

Member: **\$1,849** | Nonmember: **\$2,649**

You win when you hold the **BEST ACE**

If you're eager to make your CU the best financial institution possible, we're ready to help.



nafc.org/join



REGULATORY COMPLIANCE SCHOOL

Arlington, VA | March 14 - 18, 2022

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

For compliance staff and others who work closely with compliance

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.

- › Earn the prestigious, award-winning NAFCU Certified Compliance Officer (NCCO) designation by passing all four required exams (additional fee applies).
- › Gain a thorough understanding of foundational compliance knowledge
- › Review best practices for efficiently researching new compliance changes
- › Network with NAFCU's regulatory compliance counsels and compliance officers from around the nation
- › Prepare your credit union for what's coming next with a half-day dedicated to regulatory updates
- › **Receive a free e-copy of our 2022 Credit Union Compliance Roadmap** that breaks down complex federal regulations into easy-to-understand terms



nafcubank.com/school22 | 800.344.5580

Member: **\$2,199** | Nonmember: **\$3,299**

Save **\$200.00** with code **SCHOOLSAVINGS** through 1/14/22

STRATEGIC GROWTH CONFERENCE

Greenville, SC | March 21 - 23, 2022

DRIVE YOUR CREDIT UNION'S REVENUE GROWTH

For C-level executives, vice presidents, marketing, business development, E-commerce, lending, and operations staff

You'll walk away with leading strategies and real-world examples for driving growth, staying relevant now and in the future, strengthening your member culture, and outperforming your competition. If you thirst for what's next so your credit union can thrive, not just survive - then this is the perfect conference for you.

- › Attract new members by utilizing technology and AI to beat the competition
- › Drive your revenue to the next level by developing key strategies to push your loan portfolio forward
- › Rejuvenate your credit union and build loyalty with strategies that take your member experience culture to an even higher level of excellence
- › Boost share-of-wallet by learning best practices from the industry's most successful credit unions
- › Discover best-in class strategies for creating and effectively communicating a strong brand for your credit union



nafcu.org/growth22 | 800.344.5580

Member: **\$1,449** | Nonmember: **\$2,049**

Save **\$200.00** with code **SGCSAVINGS** through 1/21/2022



SHARE VALUABLE INSIGHTS. USE NAFCU NETWORKS

Thousands of credit union employees across the country are joining forces within NAFCU's free, member-only networks, where they can easily troubleshoot problems, receive feedback in real-time, share helpful resources, and more.

- CEO NETWORK
- CFO NETWORK
- COMPLIANCE, RISK & BSA NETWORK
- LENDING NETWORK
- MARKETING AND GROWTH NETWORK
- HUMAN RESOURCES NETWORK
- IT & CYBERSECURITY NETWORK
- ONES + CFPB SUPERVISION NETWORK



nafcu.org/networks

BOARD OF DIRECTORS AND SUPERVISORY COMMITTEE CONFERENCE

Nashville, TN | April 11 - 14, 2022

DEVELOP MORE EFFECTIVE BOARD AND SUPERVISORY SKILLS

For volunteer officials

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. Now with extra supervisory committee breakout sessions!

- › Achieve NAFCU Certified Volunteer Expert (NCVE) certification by passing the exam after the optional, complimentary pre-conference webinar. 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



[nafcuboard22](https://nafcuboard22.org) | 800.344.5580

NAFCU Member: **\$1,749** | NAFCU Nonmember: **\$2,449**
Save **\$200.00** with code **BOARDSAVINGS** through **2/11/2022**

CEOS AND SENIOR EXECUTIVES CONFERENCE

Key West, FL | May 11 - 13, 2022

GAIN FRESH PERSPECTIVES AND NETWORK WITH OTHER CREDIT UNION LEADERS

For CEOs, C-level executives and vice presidents

The industry's foremost event for credit union CEOs and senior executives to come together for candid conversations. Refocus, network and problem-solve in an ideal environment for top credit union leaders. You'll be able to easily take advantage of fresh perspectives from your peers, industry experts, and NAFCU staff, so you can help your credit union thrive.

- › Gain insight into how your credit union can prosper amidst current and future disruptions.
- › Explore research analysis to help you determine which business and tech trends will matter most to your credit union
- › Discover how to deliver real value to your members
- › Get details on emerging opportunities in digital payments, lending, and member service
- › Build your network of credit union CEOs and senior executives



nafcuhq.org/executive22 | 800.344.5580

Member: **\$1,449** | Nonmember: **\$2,199**

Save **\$200.00** with code **CEOSAVINGS** through **3/18/2022**

FREE TRAINING FOR YOUR STAFF

Members Only

Our recently updated New Staff Online Training Subscription is exclusively for NAFCU member credit unions. It provides an introduction to credit unions, so you can focus on organization-specific processes for new hires.



nafcuhq.org/newstaff22

55TH ANNUAL CONFERENCE AND SOLUTIONS EXPO

Montreal, Canada | July 12 - 15, 2022

SOLUTIONS AND STRATEGIES TO HELP YOU BUILD A BIGGER, BETTER CREDIT UNION

For CEOs, C-level executives, vice presidents, and volunteer officials

Discover solutions and strategies for the most important topics affecting credit unions, so your board and executive team can implement the most successful 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. All in this Canadian city famous for its majestic French architecture and language, distant views of snow-capped mountains, deep blue sea, stunning skyscraper skyline, fresh-off-the-boat seafood, and so much more!

- › Gain insight into how to better attract and retain top talent at all levels of your credit union, especially amid a changing workforce
- › Review expert discussion around emerging industry trends to help your credit union identify opportunities and mitigate risks
- › Discuss actionable takeaways for achieving rapid growth at your credit union in an efficient and effective manner
- › Build a stronger network of credit union CEOs, executives, board members and supervisory committee members from around the country
- › Achieve NAFCU Certified Volunteer Expert (NCVE) certification by passing the exam after the optional on-demand webinar.



nafcuhq.org/annual22 | 800.344.5580

NAFCU Member: **\$1,799** | NAFCU Nonmember: **\$2,599**
Save **\$200.00** with code **ACSAVINGS** through **5/20/2022**

VIRTUAL RISK MANAGEMENT SEMINAR

Virtual Event | August 16 – 18, 2022

IDENTIFY, MEASURE AND MASTER RISK

For CEOs, C-level executives, vice presidents, risk, audit, and senior compliance staff

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.

- › 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
- › Build a strong network of credit union risk professionals from around the country
- › Earn NAFCU's Certified Risk Manager (NCRM) designation when you take and pass the optional certification exam – and recertify just by attending, no exams necessary



nafcu.org/risk22 | 800.344.5580

Member: **\$1,399** | Nonmember: **\$1,999**

THE CREDIT UNION DIRECTOR HANDBOOK

**The must-have
resource for
all CU board
members**



Give your board members a boost with NAFCU's Credit Union Director Handbook. It's the perfect resource to educate new board members on industry standards and expectations, and help seasoned board members stay up-to-date on evolving issues.

Order the updated 2022 edition now, shipping in April!



nafcuhandbook.org/boardhandbook22

CONGRESSIONAL CAUCUS

Washington, D.C. | September 11 - 14, 2022

ADVOCATE FOR CREDIT UNION SUCCESS BY ENGAGING WITH CAPITOL HILL

For CEOs, C-level executives, vice presidents, volunteer officials, government affairs and community relations staff

In today's uncertain political environment, you can make more of a difference than ever. 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.

- › Represent your members by telling your credit union's story on Capitol Hill in person or via video conference
- › Lobby Congress for regulatory relief and the creation of a growth-based environment for credit unions and more
- › Hear directly from Congressmembers and regulators about their efforts to support credit unions
- › Get additional, invaluable legislative and regulatory updates from 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



nafcu.org/caucus22 | 800.344.5580

Member: **\$1,199** | Nonmember: **\$1,749**

Save **\$200.00** with code **CCSAVINGS** through **7/15/2022**



**GROW
STRONGER**

MAXIMIZE YOUR MEMBERSHIP

Take advantage of 650+ credit union resources
annually built to help you grow and thrive.

Download NAFCU's Member Benefits Checklist



nafcu.org/checklist



THE NAFCU JOURNAL

In-depth coverage of credit union operations, technology, marketing and more... written especially for the credit union professional.



nafcu.mynewscenter.org

CFO SUMMIT

TBD | September 2022

SECURE THE SOLUTIONS YOU NEED TO ACHIEVE SUCCESS

For CFOs, controllers, and vice presidents of finance

As a CFO you hold special responsibility for helping steer your credit union toward 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.

- › 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 toward maintaining your CPA
- › Build a stronger network of industry peers from across the country



nafcu.org/cfo22 | 800.344.5580

Member: **\$1,299** | Nonmember: **\$1,799**

Save **\$200.00** with code **CFOSAVINGS** through **7/29/2022**

REGULATORY COMPLIANCE & BSA SEMINAR

Louisville, KY | September 27 - 29, 2022

SHARPEN YOUR COMPLIANCE AND BSA KNOWLEDGE

For NCCOs, NCBSOs, compliance, audit, and legal staff

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

- › Learn how to conquer the latest compliance and BSA challenges, and discuss your specific issues face-to-face with industry experts
- › Expand your network of credit union compliance, and BSA professionals, attorneys and experts
- › Earn all the CEUs needed for recertification of our prestigious, award-winning NAFCU Certified Compliance Officer (NCCO) designation
- › Attend the BSA sessions to earn all the CEUs needed to recertify your NAFCU Certified Bank Secrecy Officer (NCBSO) designation
- › Gain insight on the impact of the administration on the regulatory environment



nafcu.org/seminar22 | 800.344.5580

Member: **\$1,899** | Nonmember: **\$2,799**

Save **\$200.00** with code **SEMINARSAVINGS** through 8/5/22

MANAGEMENT AND LEADERSHIP INSTITUTE

Annapolis, MD | October 17 - 21, 2022

ADVANCE YOUR CAREER AS A CREDIT UNION LEADER FASTER

For senior and mid-level management, branch and operations managers, or anyone else who aspires to credit union leadership

Take your career 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 impactful leader who has what it takes to run a successful credit union.

- › Get a solid understanding of credit union financial management, including accounting cost analysis and risk management
- › 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
- › Expand your network of fellow board and supervisory committee members



nafcu.org/management22 | 800.344.5580

NAFCU Member: **\$2,149** | NAFCU Nonmember: **\$3,249**
Save **\$200.00** with code **MLISAVINGS** through **9/16/2022**

LENDING CONFERENCE

Greenville, SC | November 8 - 10, 2022

CREATE NEXT-LEVEL LENDING SUCCESS

For C-level executives, vice presidents, and lending staff

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.

- › 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 and Gen Z
- › Utilize powerful mortgage, credit card, business and auto lending strategies
- › Sharpen your edge over traditional and online competitor products



nafcu.org/lend22 | 800.344.5580

Member: **\$1,699** | Nonmember: **\$2,499**

Save **\$200.00** with code **LENSAVINGS** through **9/16/2022**



THE CREDIT UNION **MERGER & ACQUISITION** HANDBOOK

Get your insider's guide to CU mergers

While NAFCU doesn't specifically encourage credit unions to merge, if you're considering it, our Credit Union Merger & Acquisition Handbook provides a step-by-step guide to navigating a difficult process—providing you with as much relevant information as possible.



nafcuhandbook.org/merger-handbook22

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



NAFCU Certified Compliance Officer.

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

Available at:

- › Regulatory Compliance School

Recertify with:

- › Regulatory Compliance Seminar
- › Online Compliance Training Subscription



NAFCU Certified Bank Secrecy Officer.

Pass one examination to show you're prepared to protect your credit union and the U.S. financial system against money laundering and anti-terrorist financing threats, and show regulators you're dedicated to BSA compliance.

Available at:

- › Virtual BSA School

Recertify with:

- › Regulatory Compliance & BSA Seminar
- › Online Compliance Training Subscription



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

Available at:

- › Virtual Risk Management Seminar

Recertify with:

- › Virtual Risk Management Seminar
- › Online Compliance Training Subscription



NAFCU Certified Volunteer Expert. 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
- › Board of Directors Online Training Subscription

EASY BUDGETING GUIDE

(RECOMMENDED TRAINING BY TITLE AND ROLE)

CEOs and Executive Team

Starts At

| | |
|---|---------|
| Strategic Growth Conference..... | \$1,499 |
| CEOs and Senior Executives Conference | \$1,499 |
| 55th Annual Conference and Solutions Expo | \$1,799 |
| Virtual Risk Management Seminar | \$1,399 |
| Congressional Caucus | \$1,199 |
| CFO Summit..... | \$1,299 |

Senior Management

| | |
|--|---------|
| Strategic Growth Conference..... | \$1,499 |
| Virtual Risk Management Seminar | \$1,399 |
| Congressional Caucus | \$1,199 |
| Management and Leadership Institute..... | \$2,149 |
| Lending Conference..... | \$1,699 |

Board and Supervisory Committee Members

| | |
|--|---------|
| Board of Directors and Supervisory Committee Conference..... | \$1,749 |
| Board of Directors Online Training Subscription..... | \$699 |
| 55th Annual Conference and Solutions Expo | \$1,799 |
| Congressional Caucus | \$1,199 |

Marketing and Lending Staff

| | |
|--|---------|
| Strategic Growth Conference..... | \$1,499 |
| Management and Leadership Institute..... | \$2,149 |
| Lending Conference..... | \$1,699 |

Compliance, BSA and Risk Staff

| | |
|---|---------|
| Online Compliance Training Subscription | \$2,599 |
| Virtual BSA School | \$1,849 |
| Regulatory Compliance School | \$2,199 |
| Virtual Risk Management Seminar | \$1,399 |
| Management and Leadership Institute..... | \$2,149 |
| Regulatory Compliance & BSA Seminar | \$1,899 |

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

KEEP PUSHING FORWARD

“ The overall program was outstanding. The opportunity to chat with other credit union officials was excellent, and provided a platform to discuss matters affecting all credit unions. ”

Ramon Gallardo *CEO, Erie Metro FCU*

nafcuhq.org/2022training | 800.344.5580
Open to everyone. Special rates for members!