



RIGHT TIME. RIGHT PLACE. **RIGHT SOLUTION.**

## 2019 MANAGEMENT ROUNDTABLE

**OCTOBER 1 & 2**  
SAMOSET RESORT  
ROCKPORT MAINE



Maine Credit Union League

## TUESDAY, OCTOBER 1

**NOON – 1:00 PM** LUNCH

**1:00 – 2:30 PM** **BEYOND 2020: POLITICAL, ECONOMIC AND TECH TRENDS THAT WILL AFFECT YOUR CREDIT UNION IN THE NEXT THREE YEARS...AND THE ACTIONS YOU SHOULD TAKE**

The most successful business executives and leaders have this one thing in common: they are always looking ahead. As a credit union CEO or senior level manager, it's your job to be thinking ahead. In an energetic and fast moving presentation, Gene Marks will share with you the latest political, economic and technology trends that will be affecting your credit union with actions for meeting those challenges.



**Speaker:** Gene Marks, CPA, business owner, author and business columnist

Gene Marks is a past columnist for both The New York Times and The Washington Post. He now writes regularly for The Hill, The Philadelphia Inquirer, Forbes, and Inc. Magazine among others. He has written five books on business management specifically geared towards small and medium sized companies. Gene owns the Marks Group PC, a ten-person firm that provides technology and consulting services to small and medium sized businesses. Prior to starting his business, Gene spent nine years with the international consulting firm KPMG in Philadelphia.

**2:45 – 4:00 PM** **ROUNDTABLE DISCUSSION/LEAGUE UPDATE**

League President Todd Mason will highlight issues impacting Maine credit unions today and what the Maine Credit Union League and Synergent are doing to strengthen the credit union position in the marketplace.



**Speaker:** Todd Mason, President/CEO, Maine Credit Union League

Todd began his duties as President/CEO of the Maine Credit Union League and Synergent in April 2017. Prior to his appointment as President/CEO, Todd served as Chief Strategy Officer for RouteOne, an indirect automotive lending technology company. Prior to this, he enjoyed a 19 year career with the Michigan Credit Union League and Affiliates where he served in a variety of capacities ranging from Vice President of Technology, Education and Marketing; to Chief Operating Officer for CU Solutions Group. He also helped launch the cooperative venture League InfoSight, where he served as its Chief Operating Officer.

**5:30 – 6:30 PM** **CONFERENCE RECEPTION/HOST BAR**

**6:30 – 8:00 PM** **DINNER BUFFET**

**Conference reception and dinner sponsored by Synergent, CUNA Mutual and Tricorp FCU**



## WEDNESDAY, OCTOBER 2

7:30 – 9:00 AM

### CONTINENTAL BREAKFAST

9:00 – 9:30 AM

### OPENING SESSION/INTRODUCTIONS

**Speaker:** Todd Mason, President/CEO, Maine Credit Union League

The morning program will be a series of roundtable discussions focused on the **Moving Maine Forward** initiative announced at the Annual Meeting earlier this year. It will feature Maine leaders presenting the opportunities and challenges we face in the state. As part of those presentations, there will be brainstorming sessions on how credit unions can support the state through the three pillars of **Moving Maine Forward**, economy, community and people, and helping credit unions grow as a result.

9:30 – 10:45 AM

### MAINE ECONOMIC OUTLOOK AND LABOR

**Panelists:** Dana Connors, President/CEO Maine State Chamber of Commerce and Yellow Breen, President/CEO Maine Development Foundation

11:00 AM - 12:15

### CREDIT UNIONS AND COMMUNITY INVOLVEMENT

**Panelists:** Judith Shaw, Esq., Securities Administrator for Maine Office of Securities; Claude Rwaganje, Founder and Director of ProsperityME; and Jake Holmes, Financial Literacy Outreach Coordinator, Maine Credit Union League

12:15 – 1:00 PM

### LUNCH

1:00 – 2:15 PM

### THE POWER OF DIVERSITY AND INCLUSION

Your community and workforce are becoming increasingly diverse. Is your credit union prepared? The discussion of diversity and inclusion (D&I) in business settings tends to follow two distinct directions: embracing D&I as a means to reach new multicultural markets and customers, and embracing D&I as a means to grow and improve a company's internal workforce. Explore the intersection of these efforts, and how an effective business strategy must recognize that differences and diversity makes everything better.



**Speaker:** Angela Russell, Vice President of Diversity, Equity, and Inclusion at CUNA Mutual Group and Vice President of the CUNA Mutual Foundation

Angela is responsible for leading the development, direction and implementation of short and long-term strategies and programs that support diversity, equity and inclusion. In 2018 she was named as one of the nation's most powerful diversity executives by Black Enterprise magazine. Prior to joining CUNA Mutual she worked in various roles in Wisconsin state government including Policy Advisor to Governor Jim Doyle.

2:15 - 2:30 PM

### CONFERENCE RECAP AND DISCUSSION

2:30 PM

### ADJOURN



## OVERNIGHT ACCOMMODATIONS

To make room reservations, please use this link [Management Roundtable Conference 2019](#) or contact The Samoset directly at 800.341.1650. A block of rooms is available for Tuesday evening, October 1, at room rates of \$210 and \$233 per room. Please mention the Maine Credit Union League conference when making your reservations and provide the hotel with a copy of your tax exempt certificate.

**THE DEADLINE FOR THE CONFERENCE ROOM RATES IS AUGUST 30, 2019.** Reservations made after the August 30 cut-off date will be based on availability and may also be subject to the prevailing hotel room rate.

## PRICING

The cost for the program is \$299 per person ( \$449 for League Associate Members ). The program price includes speakers, materials, two lunches, continental breakfast, and breaks.

**Deadline for registration is September 24, 2019.** No refunds will be allowed after this date.

## REGISTRATION

### OCTOBER 1 AND 2, 2019 • THE SAMOSET RESORT

Credit Union: \_\_\_\_\_

Name: \_\_\_\_\_ Email \_\_\_\_\_

Name: \_\_\_\_\_ Email \_\_\_\_\_

Name: \_\_\_\_\_ Email \_\_\_\_\_

Please indicate number attending dinner on October 1 \_\_\_\_\_

## DISCUSSION TOPIC SUBMISSION

Please discuss the following topics during the Roundtable:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

FOR YOUR CONVENIENCE, REGISTER BY:

FAX

207.773.0957  
Attn: Member Services

EMAIL

Email registration form to:  
serlandson@mainecul.org



Maine Credit Union League