

**"THE ONES IN RED" PRESENT**

# CU INFO TECH '09

*An Innovative, Comprehensive Conference  
On Credit Union IT Issues, Products And Strategies*

**November 9–12, 2009 ■ Palm Springs, California**

*Riviera Resort & Spa*

**WHO WILL ATTEND:**

**Directors ■ CEOs ■ IT Staff ■ IT Management  
Supervisory Committee Members  
Senior Management ■ Committee Members**

**30<sup>th</sup> Anniversary**



1979

2009

*exclusively*

Educating the Credit Union Community <sup>V</sup> Since 1979

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• Monday, November 9, 2009 •

## PreConference Workshop *Only \$225!*

*\*Separate Registration Required*

### How Your Credit Union Can Make IT an Enabler of Innovation, Operational Efficiency and Profitability

Presented by **Peter Fugaro**, *President*, Prymak, LLC

Credit unions confront enormous challenges in finding and deploying systems that help improve member services, lower operating costs and increase revenue.

Peter Fugaro will show you how to close the gap between what vendors promise and deliver, how to stop inefficiencies in the flow of information before you deploy technology and how to improve integration of systems.

- **Discover** how to apply a detailed roadmap for 'advanced decision-making' when selecting new systems
- **Learn** how to set technology deployment goals to stay on-schedule and on-budget
- **Understand** how to turn technology investments into revenue
- **Examine** Technology In Action: Case Study
- **Participate** in an informative Q & A

Your credit union will benefit from your new knowledge of a proven methodology for making the correct technology decisions and getting on-time, on-budget implementation.

#### *PreConference Agenda*

- |                        |                                       |
|------------------------|---------------------------------------|
| 11:30 a.m. – 1:00 p.m. | PreConference Registration            |
| 1:00 – 1:15 p.m.       | <b>Introduction</b>                   |
| 1:15 – 2:45 p.m.       | <b>PreConference Workshop</b>         |
| 2:45 – 3:00 p.m.       | Networking/Refreshment Break          |
| 3:00 – 4:30 p.m.       | <b>PreConference Workshop</b> (con't) |
| 4:30 – 4:45 p.m.       | PreConference Wrap-Up                 |

*Peter Fugaro, President of Prymak, has provided leading financial services organizations with strategic business and technology services for more than 14 years. He has held high-level IT positions with leading banks and organizations. Peter earned a bachelor's from Stony Brook University in NY and is a 2006 graduate of the MBA's Future Leaders program.*

*Headquartered in Greensboro, NC, Prymak works with the nation's best financial services professionals—helping them drive lending and operational performance to top-notch levels. Prymak has pioneered a suite of rock-solid technology services comprised of Discovery-180, Deployment-270 and Innovation-360. The Prymak team has received numerous awards for delivering exemplary service to its customers.*

• Monday, November 9, 2009 •

5:00 – 6:00 p.m. Conference Registration

5:00 – 6:00 p.m. (S/G)

### Welcome Reception

Participants from throughout the country and their guests gather together to network, enjoy cocktails & light dining with **"The Ones in Red"**

• Tuesday, November 10, 2009 •

*Tentative Agenda – subject to change*

8:00 – 9:00 a.m. (S/G)

### Sit-Down Breakfast

9:00 – 9:15 a.m.

**Introduction** – *William Rogers*

9:15 – 10:15 a.m.

### Future Technology and Your Credit union

**William Rogers**

*President/CEO, William Rogers & Associates  
Editor, Credit Union Tech-Talk*

Credit unions need to plan effective use of technology to guarantee the success of their credit union. Get an inside look at how credit unions may be operating in the future from Bill Rogers, a credit union technology leader who has worked with credit unions nationwide for more than 40 years.

Expect to participate in this interactive session, which you'll leave with new knowledge of sources on computer tools. Here are a few of the areas Bill will cover:

- Brief history of past technology & growth
- Remote financial services
- Service anywhere, anytime
- Is bigger better?

10:15 – 10:30 a.m.

Networking/Refreshment Break



## • Tuesday, November 10, 2009 (continued) •

10:30 – 11:30 a.m.

### Information Security Evolution for Next-Generation Risks

**Peter Hefley**

*Principal, Information Security, HEIT*

As the threat landscape continues to grow and change, it's imperative that your credit union constantly evolve its security infrastructures to keep up with evolving risks.

This session will use current examples and relevant anecdotes to address the challenge facing credit unions as they spend more than ever on IT security but still find data breaches occurring at an alarming rate. Peter Hefley's organization focuses exclusively on the financial industry, and his content is prepared specifically with credit unions in mind.

You will leave Peter's presentation with a new understanding of why security requires a holistic approach.

- What are the next-generation risks?
- Why are current security strategies failing?
- How can your credit union evolve?
- What gaps should your credit union address in its security infrastructure?

11:30 a.m. – 12:30 p.m.

### Leverage Technology Acceleration into Competitive Advantage and Attract New Members

**Pam Selker Rak**

*National Marketing Director, Prymak, LLC*

Credit unions are uniquely positioned to capture more market share, even in the current economic conditions. Credit unions that accelerate operationally while effectively communicating operational progression with their markets will emerge as the winners. Learn how to improve integrated technology and how your business investments can positively impact marketing outcomes to attract new members.

Join Pam for tips on how to help your lending organization leverage its technology to position and differentiate itself at the forefront of its market.

- Discover how to identify what's "marketing-worthy" within your credit union
- Understand how investments in technology and other operational initiatives can make your CU stand out in your members' minds
- Learn techniques for touting operational successes in a consistent, effective manner
- Explore the six factors that lead to effective marketing results in the lending environment

12:30 – 1:30 p.m. (S/G) **Sit-Down Luncheon**

1:30 – 2:30 p.m.

### Reinventing IT

**Mike Scheuerman**

*Partner & Senior Consultant, Catalyst Consulting Group*

Why are you struggling with your IT infrastructure? It doesn't do what you want it to do, but you can't justify hiring more people to make it work the way you want. It's not your credit union's core area of expertise or interest, but you know that you couldn't survive without it. The solution? Outsource it!

With the changes in regulation as well as the current economic climate, every credit union is looking for ways to provide more value for their members. This session will explore the how-to's of outsourcing and provides a guide to getting your IT organization focused on providing more value to your members.

- What is the central goal of IT?
- Is it the Technology or the application of the Technology?
- Why are the bulk of IT resources typically focused on infrastructure management?
- Is IT a business drag or a business growth contributor?
- How should IT be organized to provide the greatest business benefit?

2:30 – 3:30 p.m.

### The Evolution of Mobile Banking

**Jason Marshall**

*Director of Product Management, Harland Financial Solutions*

Consumers are demanding mobile banking—the latest delivery method for Internet banking. Your credit union can't afford anything less than intense interest in the emerging technology associated with it.

As Internet banking expands, so do the channels consumers leverage. The key to success in a mobile launch is cost containment married with the marketing presence of the credit union. Leveraging existing infrastructure, extending existing capabilities, minimizing third-party costs and containing consumer support needs all play critical roles in the longevity of a mobile strategy. This session will help attendees understand the differences in mobile banking delivery methods and aid them in determining which solution is best for them.

- Different types of mobile banking delivery methods
- The pros and cons for each method
- Specific lessons learned from Jason's 10 years of mobile banking experience

3:30 – 3:45 p.m.

Daily Summation

• Wednesday, November 11, 2009 •

*Your registered Spouse or Guest is welcome to join you at these (SIG) activities.*

**8:00 – 9:00 a.m. (SIG) Sit-Down Breakfast**

**9:00 – 9:05 a.m. Introduction**

**9:05 – 10:00 a.m.**

## **Identity Theft: Where Are We Today?**

**Kent Knoblauch**

*Owner/Private Investigator, Security Consultant*

It's always a good time to take a look at the current state of identity theft. Identity theft is the largest threat with the potential for some of the highest monetary losses facing your credit unions today.

How bad is it? What are the statistics? What role does IT have in helping prevent I.D. theft?

Join private investigator and security expert Kent Knoblauch for a concise discussion of current compliance laws related to I.D. theft and how IT can contribute to the security process.

- Account reviews
- Security parameters
- Computer accountability
- Current I.D. theft statistics. How big is the problem?
- Data Breaches and Reported causes
- How to prevent them
- FACTA Red flag law. Are you in compliance yet?
- Types of I.D. theft relevant to your credit union
- Employee screening

You'll leave with proactive methods to help prevent I.D. theft, data breaches, encourage employee integrity and ensure that your credit union is in compliance with current I.D. theft laws.

**10:00 – 10:15 a.m. Networking/Refreshment Break**

**10:15 – 11:15 a.m.**

## **Introduction to Web Application Firewalls**

**Tom Desot**

*Chief Compliance Officer, Digital Defense*

The continued growth of e-commerce and online banking has increased the need for layered attack detection and prevention strategies to protect web-based applications that process online transactions. More and more institutions are finding that simple,

**10:15 – 11:15 a.m. (continued)**

traditional fire-walls provide inadequate protection for the host of new web-based applications they are now offering their members.

Web application firewalls provide a much-needed additional level of security in a sound multi-layered security strategy. It's crucial your credit union evaluate its existing information security network infrastructure to determine if web-based firewalls would provide benefit to your credit union.

Tom Desot will introduce this security technology and outline ways for implementation in the enterprise.

- Differences between traditional firewalls and web-based firewalls
- Typical web-based firewall application
- Web application firewall benefits
- Web application firewall limitations

**11:15 a.m. – 12:15 p.m.**

## **The Art and Science of Loan Acquisition and Automated Decisioning**

**Walt Agius**

*Managing Partner, CU Lending Edge*

Every credit union needs loans to survive and thrive today, as well as into the future. The challenge has always been how to attract and decision the loans you want, efficiently and cost effectively – now!

This session introduces futuristic, yet very real technology systems that promote a nearly perfect blend of high tech and high touch that allows you to serve your credit union members with the personal service they individually want and need. Walt Agius' enthusiastic and energetic presentation provides steps to follow to immediately increase loan volume, while decreasing fixed cost and overhead, and increasing productivity of your staff.

Learn how to

- Capture and fund a higher percentage of automated and manually decisioned loans
- Make significant improvements in productivity and efficiency that immediately translate to increased bottom line income.
- Resolve consistency and exception issues for future audits, exams and reporting

**12:15 – 12:30 p.m.**

Conference Summation

Thursday, November 12, 2009 • Travel Day

*Have A Safe Trip Home!*



*exclusively*

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VITAL TOPICS TO YOUR CREDIT UNION

- Future Technology and Your Credit Union
- Information on Security Evolution for Next-Generation Risks
- Leverage Technology Acceleration into Competitive Advantage And Attract New Members
- Reinventing IT
- The Evolution of Mobile Banking
- Identity Theft: Where Are We Today?
- Introduction to Web Application Firewalls
- The Art and Science of Loan Acquisition and Automated Decisioning



PRESENTED BY THE EXPERTS

- William Rogers *President/CEO, William Rogers & Associates  
Editor, Credit Union Tech-Talk*
- Peter Hefley *Principal, Information Security, HEIT*
- Pam Selker Rak *National Marketing Director, Prymak, LLC*
- Mike Scheuerman *Partner & Senior Consultant, Catalyst Consulting Group  
Director of Product Management, Harland Financial Solutions*
- Jason Marshall *Owner/Private Investigator, Security Consultant*
- Kent Knobelauch *Chief Compliance Officer, Digital Defense*
- Tom Desot *Managing Partner, CU Lending Edge*
- Walt Agius

Plus PRECONFERENCE WORKSHOP – Only \$225! (Separate Registration Required)

How Your CU Can Make IT an Enabler of Innovation, Operational Efficiency and Profitability

- Presented By Peter Fugaro, *President, Prymak, LLC*

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Name _____	PRECONFERENCE WORKSHOP <input type="checkbox"/> \$225
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Address _____	After October 9, 2009 <input type="checkbox"/> \$945
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Spouse/Guest Nickname for ID Badge _____	2nd Participant & Guest Subtotal: \$ _____

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Name _____	PRECONFERENCE WORKSHOP <input type="checkbox"/> \$225
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Email _____	September 10 Through October 9 <input type="checkbox"/> \$895
Address _____	After October 9, 2009 <input type="checkbox"/> \$945
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Spouse/Guest Nickname for ID Badge _____	3rd Participant & Guest Subtotal: \$ _____



*Please Register Additional Conference Participants and Guests on Separate Sheet.*

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