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Join at [cunacouncils.org/membership](http://cunacouncils.org/membership)
CUNA Schools & Conferences

BOARD & COMMITTEE
CUNA Credit Union Board of Directors Conference
January 19-22, 2020 // San Jose del Cabo, Mexico
CUNA Credit Union Board Certification School
May 4-8, 2020 // New Orleans, LA
CUNA Strategic Planning Roundtable
August 17-18, 2020 // Nashville, TN
CUNA Roundtable for Board Leadership
September 25-26, 2020 // Toronto, Canada
CUNA Credit Union Board Development School
2020 dates & location to be announced
CUNA Supervisory Committee & Internal Audit Conference
2020 dates & location to be announced

COMPLIANCE
CUNA & ACUIA Internal Audit Certification School
March 9-12, 2020 // Tempe, AZ
Fall 2020 dates & location to be announced
CUNA Regulatory Compliance Certification School*
April 20-24, 2020 // Clearwater Beach, FL
September 13-18, 2020 // Phoenix, AZ
CUNA Attorney’s Conference
October 26-28, 2020 // Jackson Hole, WY
CUNA BSA/AML Certification Conference with NASCUS*
November 9-12, 2020 // Fort Lauderdale, FL

FINANCE & ECONOMICS
CUNA Financial Management School*
April 20-23, 2020 // Dallas, TX
CUNA Enterprise Risk Management Certification School
April 27-29, 2020 // Clearwater Beach, FL
CUNA Finance Council Conference
May 17-20, 2020 // Anaheim, CA
CUNA Investment Certification Schools*
August 10-14, 2020 // Chicago, IL
CUNA Governance, Risk Management & Compliance Leadership Conference
September 21-23, 2020 // Austin, TX

HR & TRAINING
CUNA HR & Organizational Development Council Conference
April 19-22, 2020 // Orlando, FL
CUNA HR Compliance Certification School
July 26-29, 2020 // San Antonio, TX
CUNA Certified Credit Union Trainer School
August 5-7, 2020 // Chicago, IL
CUNA Experience Learning Live!
October 18-21, 2020 // Denver, CO

LENDING & COLLECTIONS
CUNA Business Lending Roundtable
January 28-29, 2020 // Tampa, FL
CUNA Consumer & Residential Mortgage Lending School
April 6-9, 2020 // Miami, FL

LENDING & COLLECTIONS (CONTINUED)
CUNA Business Lending Certification School
July 20-23, 2020 // Madison, WI
CUNA Collections & Bankruptcy School
September 21-24, 2020 // San Antonio, TX
CUNA Lending Council Conference
November 1-4, 2020 // San Diego, CA
CUNA Fair Lending Workshop
November 4-5, 2020 // San Diego, CA

MANAGEMENT & LEADERSHIP
CUNA Governmental Affairs Conference
CUNA National Young Professionals Conference
June 11-12, 2020 // Madison, WI
CUNA Management School
July 12-22, 2020 // Madison, WI
World Moving: A Joint Credit Union Conference
July 19-22, 2020 // Los Angeles, CA
CUNA Coaching Leadership School
August 3-5, 2020 // Chicago, IL
CUNA CEO Council Conference
2020 dates & location to be announced
CUNA Young Professionals Advocacy Workshop
2020 dates & location to be announced
CUNA Emerging Leader Institute
2020 dates & location to be announced

MARKETING & BUSINESS DEVELOPMENT
CUNA Marketing & Business Development Council Conference
March 15-18, 2020 // Orlando, FL
CUNA Digital Marketing School
June 1-4, 2020 // Seattle, WA
CUNA Marketing & Business Development Certification Schools
October 5-8, 2020 // Las Vegas, NV

OPERATIONS & MEMBER EXPERIENCE
CUNA World-Class Service Leadership School
June 10-12, 2020 // Seattle, WA
CUNA Member Experience, Sales & Service School
August 17-19, 2020 // Las Vegas, NV
CUNA Operations & Member Experience Council Conference
September 30-October 3, 2020 // Las Vegas, NV

SECURITY & TECHNOLOGY
CUNA Cybersecurity Conference with NASCUS*
June 1-3, 2020 // San Diego, CA
CUNA Technology Council Security Summit
September 29-30, 2020 // Las Vegas, NV
CUNA Technology Council Conference
September 30-October 3, 2020 // Las Vegas, NV

*eSchool is available.
Please note: All dates and locations are subject to change.
## Category Directory

### ANCILLARY DEBT PROTECTION PRODUCTS
- Mercury Mechanical Protection

### APPLICATIONS PROGRAMMING
- Access Softek

### ARCHITECTURE & CONSTRUCTION
- The Redmond Company

### ASSET LIABILITY MANAGEMENT
- Alloya Corporate FCU
- Catalyst Corporate FCU
- Corporate Central CUSO-QuantyPhi
- Corporate One FCU
- VolCorp
- WhiteCanyon Software

### ASSOCIATE BUSINESS MEMBERS
- Adlumin
- Alloya Corporate FCU
- Catalyst Corporate FCU
- CO-OP Financial Services
- Corporate Central CU
- Corporate One FCU
- CU Direct
- CU Ledger, LLC
- LSC
- Prodigy
- PSCU
- VolCorp

### ATM & REMOTE DELIVERY
- 3SI Security Systems
- CUNA Strategic Services

### AUDIT
- Nearman, Maynard, Vallez, CPAs
- PolicyWorks, LLC

### AUTO LENDING
- Black Book
- CO-OP Financial Services
- Mercury Mechanical Protection
- Origence

### BANK SECRECY ACT (BSA)
- Nearman, Maynard, Vallez, CPAs
- PolicyWorks, LLC
- VolCorp

### BOARD RESOURCES
- Rochdale Paragon Group

### BRANDING
- Datatrac

### BRANCH MANAGEMENT
- MagTek, Inc.

### BRANCH SECURITY
- 3SI Security Systems
- Adlumin
- CUNA Strategic Services

### BRANCH/PRODUCT/MEMBER/PROFITABILITY
- Creative Planning Strategic Advisor Program

### BUDGETING & PROCESS
- GoVision CRM

### BUSINESS DEVELOPMENT
- GoVision CRM

### BUSINESS LENDING
- GoVision CRM
- Jack Henry & Associates
- Newtek Business Services Corp

### CALL CENTERS
- Access Softek
- ConServe
- CO-OP Financial Services
- GoVision CRM
- PSCU

### CHECKS & WIRE TRANSFER SERVICES
- VolCorp

### CLOUD COMPUTING
- Adlumin
- MagTek, Inc.
- Member Driven Technologies
- Newtek Business Services Corp
- Symitar

### CLOUD PROCESSING
- Prodigy

### COLLECTIONS & RECOVERIES
- REPAY

### COMPENSATION
- CU Solutions Group

### CONSUMER LENDING
- CUNA Strategic Services
- Kasasa
- Oak Tree Business Systems, Inc.
- Origence

### CONSULTANTS
- Sievwright & Associates

### CONSUMER LOAN SERVICING
- REPAY

### CONTRACT MANAGEMENT
- Corporate Central CUSO – InterLutions

### CORE PROCESSING ADMINISTRATION
- Adlumin
- AMI Information Systems
- CompuSource Systems, Inc.
- Corelation
- CU-Interface mpowered
- FIS
- Fiserv
- Member Driven Technologies
- Prodigy
- Share One, Inc.
- Synergent
- Trellance
### Category Directory

**CREDIT CARDS**
- CO-OP Financial Services
- FIS
- Finerv
- Jack Henry & Associates
- LSC
- PSCU

**CUNA STRATEGIC SERVICES**
- 3SI Security Systems
- Kasasa
- LSC
- Newtek Business Services Corp

**CUSO**
- CO-OP Financial Services
- CU Solutions Group
- Prodigy
- PSCU
- Share One, Inc.
- Trellance

**DATA WAREHOUSE/DATABASE ADMINISTRATION**
- GoVision CRM
- Trellance

**DEBIT CARDS**
- CO-OP Financial Services
- CUNA Strategic Services
- FIS
- Finerv
- Jack Henry & Associates
- LSC
- PSCU
- Synergent

**DEPOSIT PRODUCT INNOVATION**
- Kasasa

**DIGITAL MARKETING STRATEGIES**
- CU Solutions Group
- CUNA Strategic Services
- Datatrac

**E-COMMERCE**
- CO-OP Financial Services

**ELECTRONIC BILL PAYMENT**
- CO-OP Financial Services
- VolCorp

**EMAIL MARKETING**
- CUNA Strategic Services
- GoVision CRM
- Origence
- Synergent

**EMPLOYEE BENEFITS**
- Corporate Central CUSO – InterLutions

**EMPLOYEE DEVELOPMENT & TRAINING**
- Credit Union National Association
- CUNA Councils

**EXECUTIVE RECRUITMENT**
- Sievwright & Associates

**FINANCIAL COMPLIANCE**
- 3SI Security Systems
- Adlumin
- Continuity
- CUNA Strategic Services
- Oak Tree Business Systems, Inc.
- PolicyWorks

**FINANCIAL REPORTING - BOARD OR MANAGEMENT**
- Adlumin

**FRRAUD MANAGEMENT/OVERSIGHT**
- Access Softek
- CO-OP Financial Services
- CULedger, LLC

**GIFT/STORED VALUE CARDS**
- LSC

**HOME EQUITY LENDING**
- Origence

**HR COMPLIANCE**
- 3SI Security Systems

**HR OPERATIONS (PROCESSES)**
- WhiteCanyon Software
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## Category Directory

**PERFORMANCE MANAGEMENT**
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**PLASTIC CARD OPERATIONS & EMV**
- CU Solutions Group

**PURCHASE-MONEY MORTGAGES**
- QRL Financial Services

**REAL ESTATE & MARKET CONSULTING**
- The Redmond Company

**REMOTE DEPOSIT CAPTURE**
- Catalyst Corporate FCU
- LSC
- MagTek, Inc.
- VolCorp

**RISK MANAGEMENT**
- Continuity
- CULedger, LLC
- CUNA Mutual Group
- PSCU
- Rochdale Paragon Group
- WhiteCanyon Software

**SALES MANAGEMENT/SALES & SERVICE CULTURE DEVELOPMENT**
- Credit Union National Association
- GoVision CRM

**SBA LENDING**
- Newtek Business Services Corp

**SECONDARY MORTGAGE MARKET**
- FICS
- QRL Financial Services

**SHAREABLE BRANCHING**
- CO-OP Financial Services

**STRATEGIC PLANNING & ADVISORY SERVICES**
- Sievewright & Associates

**STORAGE AREA NETWORK (SAN) MANAGEMENT**
- Newtek Business Services Corp

**TECHNOLOGY**
- Corporate Central CUSO – Emergifi

**TECHNOLOGY COMPLIANCE**
- 3SI Security Systems
- Adlumin
- CULedger, LLC
- CUNA Strategic Services
- Member Driven Technologies

**TRAINING & EDUCATION**
- Credit Union National Association

**WEB DEVELOPMENT/MANAGEMENT**
- BankSITE® Services
- CompuSource Systems, Inc.
- CU Solutions Group
- Newtek Business Services Corp
- Share One, Inc.

**WIRELESS (MOBILE) BANKING**
- Access Softek
- CO-OP Financial Services
- Cubus Solutions, Inc.
- PSCU
- Share One, Inc.
- VolCorp

**WORKERS COMPENSATION/SAFETY**
- Newtek Business Services Corp

**YOUTH MATERIALS**
- Credit Union National Association

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We look forward to our continued work to advance the value and importance of credit union membership.

modernmember.com
modernmember@symitar.com
888-774-2265
Provider Directory

3SI Security Systems
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Malvern, PA 19355
Lisa Moughan
610-280-2000
info@3si.com
www.3si.com

A CUNA Strategic Services alliance provider for over 25 years, 3SI provides effective security solutions that recover assets, help police apprehend criminals, and provide peace of mind to you, your staff and your customers. We combat crime at credit unions through technologies including GPS/GNSS tracking, cash staining, and safe branch opening/closing apps. Used in thousands of credit union branches, our tracking and staining technology protects from cash in teller drawers, ATMs, and cash dispensing/recycling units. Our newest technology, SafeResource, protects staff at their most vulnerable (during branch openings/closings), provides full audit information AND complies with Federal guidelines. Contact us to learn how we are creating a #SaferWorld.

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Maddie Greene
510-898-7606
communications@accesssoftek.com
www.accesssoftek.com

Access Softek, Inc. lives on the cutting edge of digital banking technology. Dedicated to innovation and continually improving the member experience, Access Softek’s most recent innovations include:
• An easy-to-use automated investment tool completely integrated within mobile and online banking
• Biometric call center authentication designed to improve security and reduce call times
• A fraud control tool which uses machine learning and a deep neural network to prevent fraud

These are the latest steps in Access Softek’s history of innovative digital banking firsts, which include the first app-based mobile banking; first web-based Personal Financial Management (PFM); and first triple play of app, WAP, and SMS banking.

Since 2004, Access Softek has continued to deliver industry firsts to over 400 bank and credit union customers from its Berkeley, California headquarters. Learn more at AccessSoftek.com.

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Washington, DC 20036
Col (Ret) Timothy Evans,
Esq., LL.M.
202-352-8001
timothy.evans@adlumin.com
www.adlumin.com

Leading SIEM Technology (Washington DC) | Adlumin is the leading Financial Institution cloud-native Security Information and Event Management (SIEM) solution, with world-class analytics and machine learning, and priced for any size business. Using the power of the cloud Adlumin is seamless to integrate into the customers environment, typically taking about an hour and 20 minutes to deploy and integrate. Adlumin provides the first ever cloud-native SIEM solution with the capability to monitor and defend customer networks locally, in the cloud, and across the globe. Adlumin has built NCUA’s Automated Cyber Examination Tool (ACET) into the platform, which will become your system of record. Using Artificial Intelligence and Machine Learning Adlumin has built a SIEM platform that writes its own rules, customers don’t need to struggle to write magical queries or SIEM rules to get the technology to work for them. Using advanced data science models Adlumin provides a hand’s free SIEM platform, no PHD required. The first ever SIEM solution that is cost-effective, easy to use, and easy to integrate our robust platform provides unmatched security that defends your network from the security perimeter to the Dark Web.
No matter the product or service, imagine only having to make one call. As the premier credit union managed services provider, our singular mission is to help you succeed and improve the financial lives of your members.

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- Business intelligence for actionable insights
- Transactional Data Mining with proven marketing ROI

OUR INNOVATION IS YOUR COMPETITIVE ADVANTAGE.

Provider Directory

Alloya Corporate FCU
184 Shuman Blvd., Suite 400
Naperville, IL 60563
Tim Bruculere
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tim.bruculere@alloyacorp.org
www.alloyacorp.org

Alloya provides critical cooperative services and tremendous value to over 1,500 member credit unions and credit union entities nationally, including investment, financial, lending and correspondent services. Headquartered in Naperville, Illinois, Alloya offers a dependable and affordable line of credit, secure and efficient product access and settlement, and unparalleled member service to its members. To learn more, visit www.alloyacorp.org.

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Brian Clegg, Lender Solutions Manager
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bclegg@blackbook.com
www.blackbook.com

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Scottsdale, AZ 85254
Ira H. Aurit
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cfo@banksiteservices.com
https://www.banksiteservices.com

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Scottsdale, AZ 85254
Ira H. Aurit
602-867-2330
cfo@banksiteservices.com
https://www.banksiteservices.com

BankSITE® Services develops and hosts ADA Compliant Websites with an 20-year track record of no security issues, server downtime, or price increases. We offer mobile friendly, responsive websites created in 30 days with world-class hosting, security monitoring, and our NEW Secure Forms System allowing you to edit our forms, or create create new forms, and allow members to upload secure files. Our services are enjoyed by hundreds of FIs, and meet the guidelines of Federal Examiners.
Provider Directory

Canon USA
One Canon Park
Melville, NY 11747
Robert Ladich
717-557-7763
bladich@cusa.canon.com
usa.canon.com/scanners

Canon’s check transports and document scanners are designed to streamline payment and imaging processes in the areas of loan processing, teller capture, back counter check scanning and RDC. With the use of intelligent software and high-quality imaging, Canon’s document and check scanners have the ability to securely and reliably store financial and related documentation while helping eliminate the need for manual data entry, which saves time and mitigates risks associated with most financial processes.

Catalyst Corporate Federal Credit Union
6801 Parkwood Blvd.
Plano, TX 75024
Karen Coble
214-703-7831
coblek@catalystcorp.org
www.catalystcorp.org

Catalyst Corporate Federal Credit Union is a wholesale cooperative financial institution serving nearly 1,400 credit unions nationally with innovative core financial services and superior back-office support. Services, designed specifically for the credit union industry, include payment solutions, liquidity, investment options and balance sheet management assistance.

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Sievewright & Associates’ founder, Mark Sievewright, has more than 30 years of global financial services experience and has worked with numerous Credit Unions in the successful formulation and execution of their strategic business and technology plans. Mark is a renowned industry thought-leader who has held senior leadership positions at HSBC in London; MasterCard International in Brussels; and, U.S.-based firms Payment Systems Inc. (where he served as CEO), TowerGroup (where he served as CEO) and Fiserv (where he served as president of the company’s Credit Union Solutions division).

Mark has spoken at more than 250 credit union events and is the recipient of a number of industry awards. In 2010, Mark was merited the Ambassador Award by the World Council of Credit Unions for helping credit unions better understand and capitalize on their market strengths.

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Symitar® joins our credit union partners to serve the needs of the modern member. We offer an open technology foundation that enables and promotes your people-helping-people goals. From open APIs to personalized member-centric tools to a collaborative, strategic engagement with our customers, we stand ready to boost your success. Symitar is your human-centered, tech-forward, insight-driven partner. Together we advance the value and importance of credit union membership.

The Redmond Company
W228 N745 Westmound Drive
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www.theredmondco.com

Redmond provides a spectrum of services, including market analysis, site selection, brokerage services, brand implementation, design and construction—Resulting in member growth and increased ROA. We help identify the optimal location and determine the “right” size of your facility—making your facility a tool to attract and retain employees and enhance the member experience. Redmond's experience with national retailers, gives us knowledge of retail-based design strategies and consumer-purchasing patterns. Think Branch Of The Future.

VolCorp
2460 Atrium Way
Nashville, TN 37214
Sandy Swofford, SVP
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sswofford@volcorp.org
www.volcorp.org

Empowering our members since 1981, Volunteer Corporate Credit Union (VolCorp) is a not-for-profit financial cooperative that serves over 350 natural person credit unions nationally. Headquartered in Nashville, Tennessee, our mission is to serve as the primary financial partner with credit unions in providing superior products, services and support.

Synergent
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Providing members the latest technology while maintaining operational efficiency takes time and effort. As a managed services provider, Synergent delivers customized, integrated services through a single source. We are a strategy-driven host of Symitar’s Episys® core processing, and trusted industry experts providing credit unions with payments, technology, business intelligence, and marketing services. No matter the product, our team of experts knows how to choose it, install it, integrate it, and help credit unions get the most out of it. Our innovation is your competitive advantage.

Trellance
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Trellance is the leading data analytics company for credit unions. Founded in 1989, Trellance is headquartered in Tampa, FL and services over 1,500 credit unions nationwide. The Trellance team consists of experts who specialize in data integration and warehousing, data consulting, and data driven portfolio growth management that empower credit unions to drive member experience.

WhiteCanyon Software
947 South 500 East, Suite 300
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Crystal Harris
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WhiteCanyon Software provides the WipeDrive solution for erasing SSD, NVMe and platter-based hard drives. The software securely erases the devices to NIST and DoD standards and provides a wipe report for each drive. WipeDrive securely erases laptops, desktops, workstations, servers and mobile devices. Each year over 1M devices are erased with WipeDrive.
Invest in next-level financial counseling

Help members get the answers to their financial questions, navigate debt and plan for more promising financial futures. Grow your credit union with the knowledge and skills obtained through CUNA Financial Counseling Certification Program (FiCEP).

You’ll learn how to:

// Help members manage their finances

// Build deeper relationships with members

// Attract new members

// Increase product and service revenue

// Reduce bad debt

cuna.org/ficepconnect

“By establishing and deepening relationships with our members, we will help them along and give them confidence in not just their current financial situation, but their knowledge and their ability to set up more financially responsible services in the future.”

- Lloyd Cockerham, President & CEO, Ascension CU
Thank you to our CUNA Associate Business Members serving as business advocates for the credit union movement

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Show your support of the credit union movement - visit [cuna.org/associatemembership](http://cuna.org/associatemembership) for more information

Membership as of 5/20
Tactical, straightforward tools for credit union board members

Credit unions are different, and board members are an integral part of creating that difference. While you’re focused on improving your credit union, it’s our mission to support you in broadening your industry knowledge and gaining a foothold in credit union advocacy.

Focus areas for board members:

- Learn about credit unions and the movement
- Ensure credit union financials and operations are sound
- Advocate for the credit union movement
- Improve credit union products and services
- Prepare for the future

Learn more at [cuna.org/board-commit]
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