



AGENDA

PROCU Annual Conference

Product & Research Organization for Credit Unions

October 4, 2009 – October 6, 2009

Surf & Sand Resort, Laguna Beach, CA

Sunday, October 4, 2009

11:00 a.m. – 4:00 p.m.	Golf Tournament Talega Golf Club Address: 990 Avenida Talega, San Clemente, CA 92673	
6:00 p.m. – 8:00 p.m.	Welcome Reception – A Hosted Reception	Ocean Terrace

Monday, October 5, 2009

7:30 a.m. – 8:30 a.m.	Registration and Breakfast	Foyer to Pelican Room
8:30 a.m. – 8:45 a.m.	Welcome, Introductions and Opening Remarks: Becky Nilsen – Chair , PROCU Board of Directors	Pelican Room
8:45 a.m. – 10:15 a.m.	MQ – Developing your Memorability Quotient Robert A. Shore – CEO & Chief Memorability Officer shorespeak® Sponsored by LPL Financial & Essex National Securities Inc.	Pelican Room
10:15 a.m. – 10:30 a.m.	Break *Refreshments provided	Foyer to Pelican Room
10:30 a.m. – 12:00 p.m.	The Road Ahead – an Economic Forecast Gail Mitchell, CFA – SVP & Account Manager , PIMCO/Allianz Life Financial Services, LLC	Pelican Room
12:00 p.m. – 1:00 p.m.	Lunch	Foyer to Pelican Room
1:15 p.m. – 2:15 p.m.	Protecting Your Member List, What are the Options? Brian A. Cabianca – Partner and John M. Welch - Partner Squire, Sanders & Dempsey, L.L.P.	Pelican Room
2:15 p.m. – 3:30 p.m.	Best Practices – Integration of Financial Services within the Credit Union – Panel Discussion Scott S. Jenner – CEO/President Addison Avenue Financial Partners, LLC Doug Wicks – President Kinecta Financial & Insurance Services, LLC Sherry Reams – Managing Director , Investment & Retirement Advisors at American Airlines Federal Credit Union Brett Everhart, CFP® – Vice President North Island Credit Union Investment Department	Pelican Room

Afternoon and dinner on you own

Tuesday, October 6, 2009

7:15 a.m. – 8:00 a.m.	Breakfast	Foyer to Pelican Room
8:00 a.m. – 9:00 a.m.	Marketing Products and Services Leveraging New Technologies “Knowledge is Power” Mark Tennyson Houge Solutions	Pelican Room
9:00 a.m. – 10:15 a.m.	FINRA UPDATE– Hot Topics, Proposed Legislation, Dispute Resolution Laura McNamire - Regional Director (West Region) FINRA	Pelican Room
10:15 a.m. – 10:30 a.m.	Break	Foyer to Pelican Room
10:30 a.m. – 11:30 a.m.	Best Practices – What are Your Options in the World of Trust Services? – Panel Discussion Carolyn Cereghino – Vice President BECU Becky Nilsen – CEO Desert Schools Financial Services, LLC Tom Walker – President & CEO MEMBERS Trust Company, FSB	Pelican Room
11:30 a.m. – 12:30 p.m.	Best Practices – What are Your Options in Setting up a P&C Agency – Panel Discussion Frank Castellano – Vice President Southwest Business Corporation Christopher Darst – Vice President Marsh, Berry & Company, Inc. Keith Kremers – Member Sales Specialist CUNA Mutual Group	Pelican Room
12:30 p.m. – 12:45 p.m.	Wrap Up – Questions, Answers & Comments Becky Nilsen – Chair, PROCU Board of Directors	Pelican Room
