



Surf & Sand Resort, Laguna Beach, CA

Pre-Conference Kick-Off Sunday, October 1st, 2023

Investment Program Manager Roundtable

Location: Sandpiper Room

2:30pm – 5:30pm

Please note, this special session is for CU Program Managers, only.

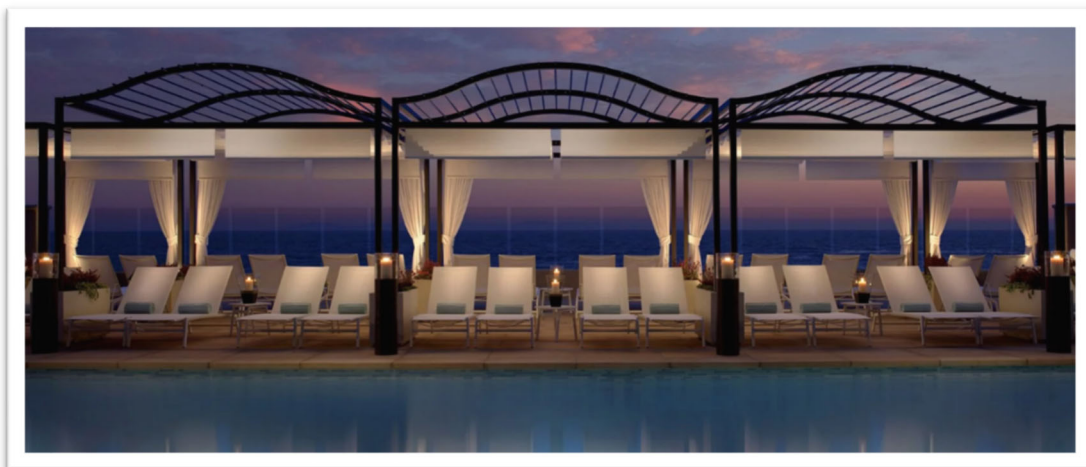
PROCU Opening Night Reception

Please join us for cocktails and tapas by the ocean!

Location: Poolside

Hosted By: Ameriprise Financial Services, Inc.

6pm – 8pm



Attire for the conference, including Welcome Reception, is business casual



2023 Conference Agenda

Monday, October 2nd, 2023

7:30 am – 8:30 am	Registration and Breakfast Breakfast Sponsored by: Raymond James	Pelican Room Foyer
8:30 am – 8:40 am	Welcome Melisa Lindsay-Lipkins - Chair, PROCU Board	Pelican Room
8:40 am – 9:50 am	Keynote: The Behavior Gap Carl Richards, CFP™ Introduced by: Melisa Lindsay-Lipkins, PROCU Board Sponsored by: LPL	Pelican Room
9:50 am – 9:55 am	Break	
9:55 am – 10:45 am	Session 1: Economic Forecast Jeff Roach – Chief Economist, LPL Financial Introduced by: Matt Snively, PROCU Board Sponsored by: LPL	Pelican Room
10:45 am – 10:55 am	Break Refreshments provided in lobby	
10:55 am – 11:45pm	Session 2: Data-Centric Strategies to Grow Your Wealth Management Practice Ian Wright - Sr. Principal Consultant & Chief Insights Officer, DDM, Equifax Todd Hoover - SVP of Data-Driven Marketing, Equifax Introduced by: Russ Gochneur, PROCU Board	Pelican Room
11:45pm – 12:45pm	Lunch Sponsored by: Cetera	Catalina Terrace

12:45m – 1:35pm	<p>Session 3: Case Study – Driving Organic Growth through Data Analytics David Bresler, CFP™ VP – Advisor Business Development Group, Ameriprise Financial</p>	Pelican Room
Introduced by: James Herring, PROCU Board		
1:35pm – 1:40pm	Break	
1:40pm – 2:25pm	<p>Session 4: Innovative Strategies in LTC & Life Chris Spates – Managing Partner, VIP Insurance</p>	Pelican Room
Introduced by: Najib Khan, PROCU Board		
2:25pm – 2:30pm	Break Refreshments provided in lobby	
2:30pm – 3:20pm	<p>Session 5: Future Focus - Succession Plans Erik Armstrong - Owner, Compass Consulting</p>	Pelican Room
Introduced by: Kim Jaime, PROCU Board		
3:20pm – 3:30pm	Monday Closing Remarks & Awards	
	<p>3rd Annual PROCU Innovation Award Tom Mitchell & Jeff Thatcher, PROCU Board</p>	Pelican Room
5:30pm – 6:30pm	Happy Hour Reception Please join us for wine and hors d'oeuvres! Sponsored by: CUSO Financial Services	
Evening	Dinner at your Leisure	

Tuesday, October 3rd, 2023

7:30 am – 8:30 am **Breakfast** Continental Breakfast Buffet Pelican Room
Foyer
Breakfast Sponsored by: CUNA

8:30 am – 8:35 am **Opening Remarks** Teo Trandafir, PROCU Board Pelican Room

8:35 am – 9:40 am **Session 6: CU Program Showcase - Program Managers share tips and best practices on what has brought their business to the next level** Pelican Room
Kelly Corah - President, Addison Avenue Investment Services
Nancy Almond - SVP/Program Manager, Numerica Financial Services
Chad Waddoups - VP, Wealth Management, Mountain America CU
Moderated by: Teo Trandafir, PROCU Board

9:40 am – 9:45 am **Break**

9:45 am – 10:40 am **Session 7: Will ChatGPT (and the AI behind it) Revolutionize our Business?** Pelican Room
Kemal Kvakic – VP, Head of Innovation, Raymond James
Introduced by: Holly Grellier, PROCU Board
Sponsored by: Raymond James Financial

10:40 am – 11:00 am **Awards & Closing Remarks** Melisa Lindsay-Lipkins - Chair, PROCU Board Pelican Room
2023 Top Director Awards – Credit Unions
Tim Kehrer – Director of Research, Kehrer Group

**Hotel checkout
@11am**

Thank you!
**Please leave your Evaluation Sheet at your
table**