



Surf & Sand Resort, Laguna Beach, CA

Sunday, September 29, 2019

Pre-Conference Roundtable

Sand Castle Room

Please note this special session is for CU/CUSO Managers only.

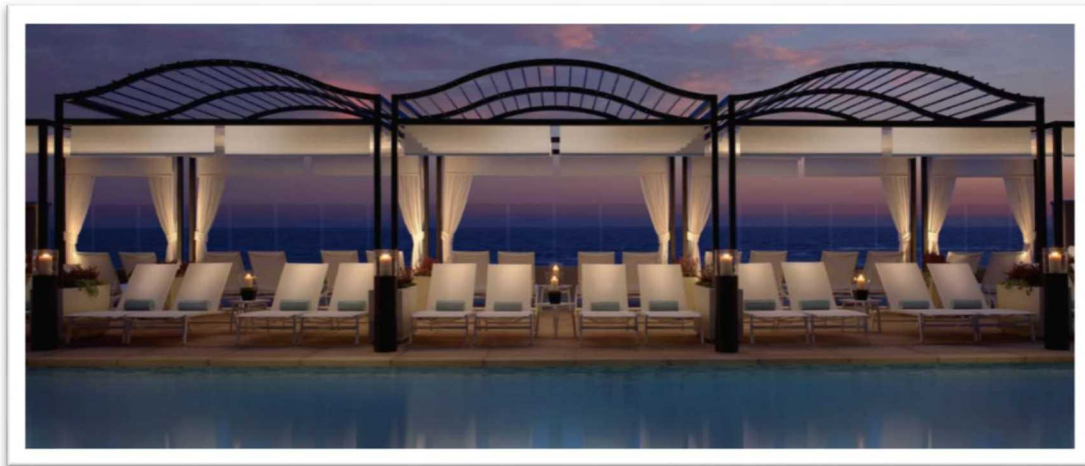
3:00 pm – 5:00 pm

PROCU Opening Night Reception

Hosted By: Ameriprise Financial Services, Inc.

6:00 pm – 8:00 pm

All Attendees please join us Poolside for drinks and heavy hors d'oeuvres.



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



AGENDA

September 30, 2019 – October 1, 2019

Monday, September 30, 2019

	Registration and Breakfast	
7:30 am – 8:30 am	Breakfast Sponsored by: CUSO Financial Services	Pelican Room Foyer
8:30 am – 8:40 am	Welcome & Opening Remarks Melisa Lindsay-Lipkins – Chairman PROCU Board of Directors	Pelican Room
8:40 am – 9:50 am	Opening Keynote – Stand for Your Brand Dave Gordon – Personal Brand & Communications Strategist, Gordon Creative Moderated by: Laura Wallace Sponsored by: LPL Financial	Pelican Room
9:50 am – 9:55 am	Break Refreshments provided	Pelican Room Foyer
9:55 am – 11:00 am	Session One – The Evolving Advisor Model – Second Story Advisors & Succession Planning Peter Bielan – Principal, Kehrer Bielan Moderated by: Holly Grellier	Pelican Room
11:00 am – 11:10 am	Break	Pelican Room Foyer
11:10 am – 12:00 pm	Session Two – Is Service A Sustainable, Competitive Advantage? Dave Patchen – SVP, PCG Edu & Practice Management, Raymond James Moderated by: Melisa Lindsay-Lipkins Sponsored by: Raymond James	Pelican Room
12:00 pm – 1:00 pm	Lunch Sponsored by: Raymond James	15FiftyFive



1:00 pm – 1:40 pm	<p>Session Three – Integrated Quote Technology – A Case Study</p> <p>Nick Bloxham – Vice President, SELCO Insurance Services, SELCO Community Credit Union</p> <p>Moderated by: Scott Jenner</p>	Pelican Room
1:40 pm – 1:45 pm	Break	Pelican Room Foyer
1:45 pm – 2:25 pm	<p>Session Four – What’s the Big Deal with Data?”</p> <p>Michael Johnson – VP, Marketing, Wealth Management, CUNA Mutual Group</p> <p>Moderated by: Carol Rose</p> <p>Sponsored by: CUNA Mutual Group</p>	Pelican Room
2:25 pm – 2:30 pm	<p>Break</p> <p>Refreshments provided</p>	Pelican Room Foyer
2:30 pm – 3:10 pm	<p>Session Five – Program Showcase</p> <p>Chad Waddoups – VP, Wealth Management, Mountain America Credit Union</p> <p>Matt Dailey – Vice President, Wealth Management, BECU</p> <p>Moderated by: Teo Trandafir</p>	Pelican Room
3:10 pm – 3:30 pm	<p>Monday Closing Remarks</p> <p>1st Annual Innovation Award</p> <p>Melisa Lindsay-Lipkins – Chairman</p> <p>Scott Jenner – Vice Chairman</p> <p>PROCU Board of Directors</p>	Pelican Room
5:30 p.m. - 6:30 p.m.	<p>Complimentary Reception</p> <p>Please join us for wine and hors d’oeuvres</p>	Ocean Terrace





Tuesday, October 1, 2019

6:30 am – 7:30 am	Sunrise Yoga	Beach or Ocean Terrace
8:00 am – 8:30 am	Coffee & Tea	Pelican Room Foyer
8:30 am – 8:35 am	Opening Remarks Melisa Lindsay-Lipkins – Chairman PROCU Board of Directors	Pelican Room
8:35 am – 9:25 am	Session Six – Economic Update John Lynch – EVP Chief Investment Strategist, Research, LPL Financial <i>Moderated by:</i> Matthew Snively <i>Sponsored by:</i> LPL Financial	Pelican Room
9:25 am – 9:55 am	Break Brunch Buffet <i>Sponsored by:</i> CUNA Brokerage Services, Inc.	Pelican Room Foyer
9:55 am – 10:45 am	Brunch Session Session Seven - Interactive Breakout Strategic Planning – An Interactive Session! <i>Moderated by:</i> Holly Grellier & Kim Jaime	Pelican Room
10:45 am – 11:00 am	Conference Closing Remarks Attendance Prize Melisa Lindsay-Lipkins – Chairman PROCU Board of Directors	Pelican Room

*Please turn in your Evaluation &
Award Nomination Forms*

Note: hotel check-out time is 12pm.