



Surf & Sand Resort, Laguna Beach, CA

Pre-Conference Kick-Off
Sunday, October 2nd, 2022

Investment Program Roundtable Meeting

Location: Sand Dollar Room

2:30pm – 5:30pm

Please note, this special session is for CU/CUSO investment managers.

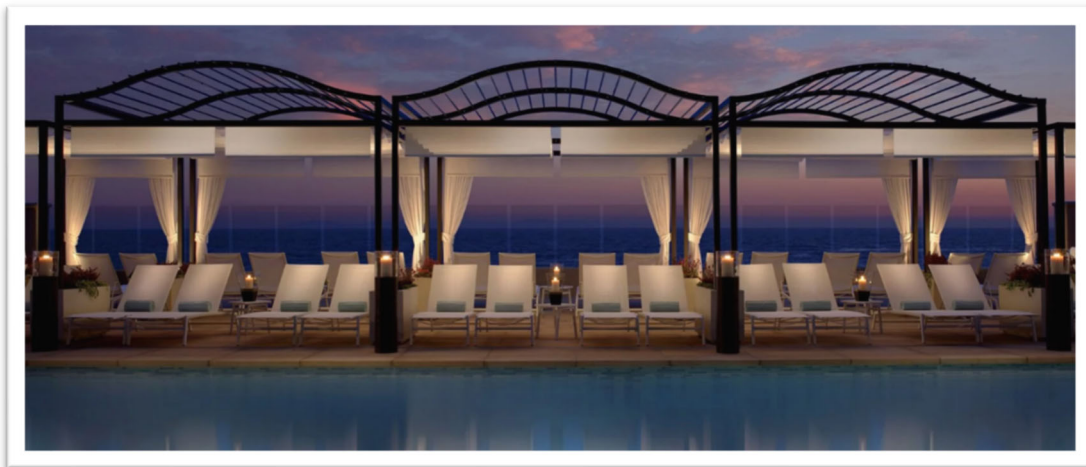
PROCU Opening Night Reception

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.



2022 Conference

Agenda

Monday, October 3rd, 2022

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: <i>The Washington Update</i> Jeff Bush – The Washington Update Introduced by: Najib Khan, PROCU Board Sponsored by: LPL	Pelican Room
9:50 am – 9:55 am	Break	
9:55 am – 10:45 am	<i>Advising Clients Now: The Importance of Values</i> Jan Blakely Holman - Director of Advisor Education, Thornburg Investment Management Introduced by: Carol Rose, PROCU Board	Pelican Room
10:45 am – 10:55 am	Break <i>Refreshments provided in lobby</i>	
10:55 am – 11:45pm	<i>Beyond the Branches: Remote Delivery of Advice</i> David Bressler - VP, Ameriprise Financial Kelli Zandstra - VP, Ameriprise Financial Brian Venn - Program Manager, California CU Introduced by: James Herring, PROCU Board Moderated by: Scott Stathis - Founder & Managing Partner at Stathis Partners, LLC Sponsored by: Ameriprise	Pelican Room

11:45pm – 12:45pm	Lunch Sponsored by: Cetera	15FiftyFive
12:45m – 1:35pm	<i>Optimizing Online Presence</i> Matt Kress - Director of Advisor Innovation, WisdomTree Asset Management Introduced by: Kim Jaime, PROCU Board	Pelican Room
1:35pm – 1:40pm	Break	
1:40pm – 2:25pm	<i>Leverage What You've Learned To Take Your Practice to New Heights</i> Matt Ransom – VP, Branch Associate & Next Gen Advisor Programs, Raymond James Introduced by: Scott Jenner, PROCU Board Sponsored by: Raymond James	Pelican Room
2:25pm – 2:30pm	Break Refreshments provided in lobby	
2:30pm – 3:30pm	<i>Investment Program Showcase: Growing Through Change</i> Karen Benedict – SVP, Northwest Financial Advisors James Herring - VP, RBFCU Services Josh Fadel – Managing Director, Desert Financial Wealth Management Moderated by: Teo Trandafir, PROCU Board	Pelican Room
3:30pm – 3:40pm	Monday Closing Remarks & Awards Tom Mitchell & Scott Jenner, PROCU Board <i>2nd Annual PROCU Innovation Award</i>	Pelican Room
5:30pm – 6:30pm	Happy Hour Reception Please join us for wine and hors d'oeuvres! Sponsored by: CUSO Financial Services	Ocean Terrace
Evening	<i>Dinner at your Leisure</i>	

Tuesday, October 4th, 2022

8:00 am – 8:30 am **Coffee & Tea** Pelican Room Foyer

8:30 am – 8:35 am **Opening Remarks**
Matt Snively, PROCU Board Pelican Room

8:35 am – 9:20 am ***Industry Update: Key Opportunities for CUs in Wealth Management***
Arthur Osman – Principal, Kehrer Bielan Research & Consulting Pelican Room

Introduced by: Jeff Thatcher, PROCU Board
Sponsored by: Ameriprise Financial

9:20 am – 9:50 am **Brunch**
Continental Breakfast Buffet Pelican Room Foyer
Sponsored by: CUNA

9:50 am – 10:40 am ***Interactive Workshop: Evaluate & Plan to Elevate Your Program's Online Presence - Practical tips to put into action today!***
Matt Kress - Director of Advisor Innovation, WisdomTree Asset Management Pelican Room

Introduced by: Holly Grellier, PROCU Board

10:40 am – 11:00 am **Awards & Closing Remarks**
Melisa Lindsay-Lipkins - Chair, PROCU Board Pelican Room

[2022 Kehrer Bielan Credit Union Investment Program Director Awards](#)

**Hotel checkout
@11am**

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