Adapting to a Changing World

2017 Conference and Golf Event

Southern California Credit Union Alliance

Adapting to a Changing World
WHO SHOULD ATTEND: Credit Union Executives, Management Team Members, Volunteers, Future Leaders and Business Partners. Space is limited. Register today at www.sccua.org

STANDARD REGISTRATION:
Registration Cost: $500
Includes a 2 day pass to the conference, all conference materials and meals.
Super-size your registration and add Golf, Spa or Wine Tour for $100.¹

FUTURE LEADER PACKAGE:
Registration Cost: $450¹
Includes a 2 day pass to the conference, all conference materials and meals.
Super-size your registration and add Golf, Spa or Wine Tour for $100.²

SPECIAL SHAPIRO PRICING:
Employees or Volunteers from credit unions with assets of $20 million or less receive a registration discount.
Standard Registration is only $300 per person!
Please contact Erica Stuppa on how to qualify for this discount.

EARLY BIRD DISCOUNT!
Register before March 31, 2017 and get your choice of Golf, Spa or Wine Tour, included with your registration.

¹ A Future Leader is a natural person credit union employee. ² The “Super-size” package includes your choice of a spot in the Wine Tour, SCCUA Golf Classic OR $100 in credit toward a treatment at the Pechanga Spa. Prior reservations are required for all of the pre-conference activities.

Cancellation Policy: You must notify us of your cancellation 30 days prior to the date of the event to receive a full refund. Cancellations made less than 30 days but 15 days or more before the date of the event will be subject to a charge of 50% of the Registration or Sponsorship cost. Cancellations made within 15 days of the event will be subject to a 100% charge of the Registration or Sponsorship cost.
Golf

Take the Journey in 2017!
Join Jon “Hole in One” Hernandez for 18 holes of golf on the world famous Journey Golf Course at the Pechanga Resort and Casino.

Spa

Get Pampered in 2017!
Sit back and relax on the Monday prior to the conference. Visit the Spa at Pechanga for a relaxing 1 hour spa treatment.

Wine Tasting

New for 2017!
Join “Two Buck” Chuck Papenfus for an afternoon of wine tasting at the local Temecula Wineries.

Door prize drawing to raise funds for CHLA and CHOC.
You can purchase tickets at the Welcome Reception. The door prize drawing will take place at the Eagle’s Nest reception on Tuesday, June 13, 2017.

To donate a door prize please contact Erica Stuppa

LIVE auction for a signed Jim Abbott Jersey!
Conference & Golf Event Speakers

Richard Montañez - Opening Keynote Speaker
ADAPT: Overcoming Management Challenges

Behind every bag of Flamin’ Hot Cheetos is the rags to riches story of an immigrant man who worked as a factory janitor and became a top-level executive after coming up with an incredibly genius idea.


Montañez grew up in the small town of Gausti near Ontario, California, where he helped support his family by b Ing grapes in vineyards and ate meals at a communal table that was shared among six or seven other families. He lived modestly and didn’t want for much as a child. Many of the kids he knew hoped to land a job at the town’s factory.

As a student, Montañez struggled with learning English and dropped out of high school as he couldn’t understand his teachers. Soon after, he got a job as a janitor at the Frito-Lay factory in Rancho Cucamonga, California. His life changed after Montañez heard a video message sent out by the president of the company. In the message, the president told his employees to act like an owner.

As fate would have it, one of the assembly line machines broke one day leaving some Cheetos without their iconic bright orange cheese dust. Richard brought some home with him and had the idea to coat them with chili powder. His recipe for spicy Cheetos was inspired by a popular Mexican street food called elote. His friends and family loved his hot Cheetos and urged Montañez to share his creation with the plant supervisors. After talking the secretary into putting his call through, the president agreed to give him a shot at pitching his new product idea.

Today he is an executive of the company he once worked as a janitor for and spearheads the Frito-Lay Hispanic marketing team. His work has influenced other Hispanic products and marketing promotions for giants including Taco Bell and KFC. Montañez believes his courage to seize opportunities stems from his humble beginnings.

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Jim Abbott - Closing Keynote Speaker
ADAPT: Overcoming Adversity

Jim Abbott was born September 19, 1967, in Flint, Michigan without a right hand. He was an All-America hurler at Michigan; won the Sullivan Award in 1987; was the pitcher for the Gold Medal Olympic Team in 1988; and threw a 4-0 no-hitter for the New York Yankees versus Cleveland (September 4, 1993). Jim played for 10 seasons on 4 different teams and ended his big league playing career in 1999. Abbott has worked with The Department of Labor’s Office of Disability Employment Policy (ODEP) on several initiatives encouraging businesses to hire people with disabilities.

Today, in addition to often being a Guest Pitching Instructor during Spring Training for the Los Angeles Angels, Jim Abbott is a motivational speaker.

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Dave DeFazio - Session Speaker
Adapting to change in a mobile world

Dave DeFazio is a partner at StrategyCorps and works with bank clients to design, build and implement a variety of checking, marketing and training programs. His extensive financial services experience and continuous research in the field ensures each product and service meets the needs of today’s retail bankers.

As partner, he develops consumer sites and mobile apps that deliver value to bank customers as well as analysis tools that allow clients to have a deeper understanding of customer relationships and product profitability. He has spoken at conferences nationwide about insight and research on innovations in financial technology, retail banking and other tactics of today’s best retailer marketers. Dave received his B.A. in Economics and Mathematics from Ohio Wesleyan University.

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Conference & Golf Event Speakers

The Cannabis Conundrum: Adapting to the Legalization of Pot in California

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Our speakers will attack this subject from both a practical and legal perspective in this hour long presentation. Pat Neighbors and Janet Sanchez from Community Credit Union of Southern Humbolt will talk about how they provide service to Cannabis farmers. While Bruce Pearson from Stystal, Wiese & Melchione will discuss how the state Cannabis laws will affect Credit Unions.

Pat Neighbors
CEO, CCUSH

Janet Sanchez
SVP, CCUSH

Bruce Pearson
Partner, SWM

Brandon Michaels - Session Speaker
Adapting Your Corporate Culture to Gen Y

Brandon Michaels is the President/CEO of Mazuma Credit Union in Kansas City. He took the reins on January 1, 2012 at the age of 31 after serving as the Chief Financial Officer for two and half years. Through his leadership and vision, the credit union has charted a new course for growth and brand differentiation within the Kansas and Missouri marketplace. Mazuma has won several awards for marketing, branding, and company culture, and is also one of the few credit unions who sponsor a major league sports team and power their affinity card program. Through his leadership, Mazuma launched a Foundation and implemented a comprehensive Corporate Social Responsibility Program where 5% of the organization’s net profits are given back to the communities they serve. Additionally, every team member of Mazuma is given up to 40 hours per year to volunteer in their communities. Brandon moved to Kansas City in 2009 from the Bay Area, California, where he held executive roles at several financial institutions.

Brandon is actively involved in various organizations, including Big Brothers Big Sisters of Greater Kansas City, Habitat for Humanity, and Swope Community Builders. He was recognized by a leading industry publication as a Trailblazer 40-Below in 2013 and in 2015, he was recognized as a Kansas City Most Wanted Honoree. He is a 2011 High Honors graduate of Western CUNA Management School and an honors graduate of the University of Oklahoma. Brandon is a pilot and proud father of 6 year old twins - Charlotte & Kason

The 2017 CEO Panel

Panelist
Hank Barrett
President/CEO
Valley First Credit Union

Panelist
Diana Michaels
President/CEO
Western Healthcare Federal Credit Union

Panelist
Nader Moghaddam
President/CEO
Financial Partners Credit Union

Moderator
Dana Schuller
Chief Admin Officer
SchoolsFirst Federal Credit Union

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Conference Agenda

Monday, June 12, 2017
11:00 - 4:30 Golf or Wine Tour (registration/reservation required)
Golf Announcements @10:40, tee off @ 11:00
4:00 - 7:00 Conference Registration open
5:30 - 7:00 Welcome Reception - Partner Pavilion Pechanga Grand Ballroom

Tuesday, June 13, 2017
8:00 - 9:00 Conference Registration & Welcome with Continental Breakfast
9:00 - 9:15 Welcome & Announcements
9:15 - 10:15 **Keynote Address – “26 tips to become a successful leader”**
Richard Montañez, Inventor, Motivational Speaker, Author
10:15 - 10:35 **“The CCUL Update”**
Larry Palochik, EVP California and Nevada CU League
10:35 - 10:55 **“The CUNA National Awareness Initiative”**
Teresa Freeborn, President/CEO of Xceed Federal Credit Union
10:55 - 11:15 Break & Networking
11:15 - 12:00 **Collaboration Breakout Sessions**
Credit Union Executives and Volunteers (main conference room)
Facilitator TBD
Business Partners and CU Associations (Partner Pavilion)
Collaborative Opportunities Discussion facilitated by Jon Hernandez
12:00 - 1:00 Lunch & Networking - Partner Pavilion Pechanga Grand Ballroom
1:00 - 2:00 **“Adapting to Changes in the Mobile World”**
Dave Defazio, Partner Strategy Corps
2:00 - 2:30 Break & Networking
2:30 - 3:45 **“The Cannabis Conundrum: How Legalizing Pot will effect CU’s”**
Pat Neighbors, CEO Community Credit Union of Southern Humbolt
Janet Sanchez, SVP Community Credit Union of Southern Humbolt
Bruce Pearson, Partner, Styskal, Wiese & Melchione
3:45 - 4:45 **Closing Keynote Address – ADAPT: Overcoming Adversity**
Jim Abbott, Olympian, Major League Pitcher, Motivational Speaker
5:00 - 7:00 Reception at the Eagle’s Nest at the top of the hotel

Wednesday, June 14, 2017
8:00 - 9:00 Reception with Continental Breakfast
9:00 - 9:15 Welcome & Announcements
9:15 - 10:15 **“Adapting Your Corporate Culture to Gen Y”**
Brandon Michaels, President/CEO of Mazuma Credit Union
10:15 - 10:30 Break & Networking
10:30 - 11:45 **CEO PANEL:**
Panelists:
Hank Barrett, President/CEO of Valley First CU
Diana Michaels, President/CEO of Western Healthcare FCU
Nader Moghaddam, President/CEO of Financial Partners CU
Moderator:
Dana Schuller, Chief Administrative Officer of SchoolsFirst FCU
11:45 - 12:00 Conference Recap and Adjournment
12:00 - 1:15 Lunch & Networking - Partner Pavilion Pechanga Grand Ballroom
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SCCUA Director: Robert York • ryork@ilwucu.org • 866.445.9828 xt. 238
SCCUA Administrator: Erica Stuppa • erica@sccua.org • 855.922.5266 xt. 801
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