symwest
USER GROUP

Wednesday, May 7, 2025
8:00 am – 4:00 pm

8:00 AM – 9:00 AM	**Registration** **Continental Breakfast sponsored by:** candescent

9:00 AM – 9:45 AM	**What's New at Your CU** This is your chance to meet the other attendees and find out what everyone is working on.
9:45 AM – 10:15 AM	**SymWest Keynote Address & Symitar Update** *Presented by: Brynn Ammon, Jack Henry*
10:15 AM – 10:45 AM	**Vendor Rapid Fire** This is your chance to hear the vendors one-minute elevator pitch and find out what services they offer.
10:45 AM – 11:15 AM	**Vendor Tech Expo**
11:15 AM – 12:00 PM	**SSDB Preparedness** *Presented by: Dave McNeil, David Rogers, & Jordan Urso, Jack Henry* The Symitar Commercial Database (SSDB) is now in use by nearly 10% of Credit Union Solutions' clients. Recent improvements have enabled these clients to reduce their time in Memo Mode and speed up nightly processing overall. This session will describe the Symitar Commercial Database enhancements, the migration process for Symitar Hosted as well as In-House clients, and how your credit union can plan for the change.
12:00 PM – 1:00 PM	**LUNCH Sponsored by:** RiskScout | SMA TECHNOLOGIES

Track 1 – Operations/Management		Track 2 – Programming/Technical	
1:00 PM – 1:45 PM	**Navigating High-Risk Accounts: Best Practices for Credit Unions** *Presented by: Kristin Parker, RiskScout* High-risk accounts, such as those associated with cannabis-related businesses or MSBs, can pose unique challenges for credit unions. This session will provide a guide to identifying, onboarding, and managing high-risk accounts in compliance with regulatory expectations. We'll cover risk assessments, due diligence processes, and practical steps to mitigate risks while building strong member relationships.	1:00 PM – 2:30 PM	**Generative AI Trends in 2025 & Applications for Credit Unions** *Presented by: Karan Kashyap, Posh* As the world of generative AI evolves at lightning speed, credit unions stand at a pivotal moment to harness its potential for transformative change. We will explore the latest trends shaping generative AI in 2025 and their tangible applications for credit unions. Learn how generative AI is enhancing member experiences, streamlining operations, and empowering employees with unprecedented tools to drive efficiency and engagement. Karan will share insights from the banking technology sector, showcase real-world use cases, and provide actionable strategies for credit unions to stay competitive in an AI-driven landscape. Join us to discover how your credit union can leverage generative AI as a catalyst for growth, innovation, and member satisfaction.
1:45 PM – 2:30 PM	**Future-Proof Your Credit Union with Today's Top Automation Tools** *Presented by: Cordy Ramer, SMA* A new era in digital transformation has arrived in financial services. As member expectations evolve and tech stacks grow more complex, it's more challenging than ever for credit unions to keep up and devote more and more resources to back-office operations. Automation tools like modern-day workload automation (WLA) are designed to help organizations get time back to focus on strategic and growth-oriented initiatives in an increasingly competitive industry—making them critical for credit unions to compete and maintain optimal productivity and efficiency now and in the future. Join us for a breakdown of the top automation tools credit unions are using today, their key benefits, and how to overcome the most common objections to automation as you search for the solution that's right for you, including: Insufficient budget, A lack of staff or project resources, Competing priorities that take precedence, A lack of executive buy-in or support, And more.		
2:30 PM – 2:45 PM	**Break Sponsored by:** IMS CLOUD SERVICES		

Track 1 – Operations/Management		Track 2 – Programming/Technical	
2:45 PM – 3:30 PM	**Top 10 Offerings to Jumpstart Optimization** *Presented by: Laura Nelson & Diane Kennedy, Jack Henry* In this informative session, we'll highlight the top 10 offerings from SymAdvisors that can help your credit union get a head start on optimization. Whether you're aiming to boost efficiency, improve member experience, or drive growth, this session will showcase the main offerings SymAdvisors provides to meet your needs	2:45 PM – 4:00 PM	**Diffusing the Growing Threat of Digital Banking Fraud** *Presented by: Jason Bedsworth, CFS Insight & Todd Richardson, Y12 Credit Union* Most credit unions are aware that fraud exists in providing access to services through their digital banking applications. Those perpetrating the fraud on member's accounts are skilled and continue to innovate ways to obtain funds illegally. Credit Unions have some but limited tools to identify, stop and/or minimize the impact of losses from digital banking fraud. CFS Insight has partnered with Y12 credit union to utilize data from digital banking providers and machine learning to more quickly identify behavior that requires immediate investigation and action. Please join this interactive and informative session to lean how you can strengthen your credit union's defenses against this growing threat and turn this negative circumstance into a positive service for your members. Jason Bedsworth from CFS Insight will describe the challenge and solution and then Todd Richardson, CTO from Y12 Credit Union on what they are doing to protect their members and the credit union from this very real threat.
3:30 PM – 4:00 PM	**Leading a High Performance Team** *Facilitated by: Adele Glenn,MBA - Cutek* The "Leading a High Performance Team" session will equip participants with the essential skills to effectively guide and motivate a group towards achieving shared goals, focusing on strategies for clear communication, delegation, conflict resolution, performance management, and fostering a collaborative team culture, enabling them to maximize team potential and deliver successful outcomes.		

Happy Hour from 4:30 – 6:30 PM at the Vendor Expo

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Thursday, May 8, 2025
8:00 am – 4:00 pm

Time	Session
8:00 AM – 9:00 AM	**Continental Breakfast Sponsored by:** THRIVE STRATEGIC SERVICES
9:00 AM – 9:45 AM	**Process Automation: Leveraging Natively Integrated Solutions** *Presented by: Tracey Archer-Lawson, Jack Henry* Fraud and Efficiency are the two top contenders for Financial Institutions this year. What are Symitar CU's doing to become more efficient and how are they combatting Fraud? Learn how financial institutions are leveraging JH solutions to increase efficiencies and reduce labor and fraud
9:45 AM – 10:30AM	**Symitar Roadmap - SymConnect Retirement Party!** *Presented by: Elizabeth Robbins, Jack Henry* We're diving into the details of SymConnect's retirement later this year. Discover key timelines, essential steps to complete, and how this transition might impact your operations. Don't miss out on preparing for the future and learning essential insights to navigate this change seamlessly.
10:30 AM – 11:00 AM	**Vendor Tech Expo**
11:00 AM – 11:55 AM	**Stickely's Cybersecurity Chronicles** *Presented by: Jim Stickley, Stickley on Security* Get ready for a wild ride through the world of cybersecurity where Stickely will share the must-know tips and tricks to protect yourself and your members from digital threats. Learn how to stay one step ahead of hackers, all while having a bit of fun along the way!
12:00 PM – 1:00 PM	**LUNCH Sponsored by:** TECHNOLOGYHAPPENS avidxchange

Track 1 – Operations/Management		Track 2 – AI/Business Intelligence	
1:00 PM – 1:45 PM	**Navigating the Project Backlog and Thriving in a Highly Competitive Industry** *Presented by: Brad Moritz & Mike Blumenthal, Technology Happens* This highly interactive session will be driven by the current Project Lists that Technology Happens has collected over the last 12 -months. This list will be shared with attendees along with historical data provided by Technology Happens to identify the existing trends, methodologies to identify the projects with the greatest return, and strategies to thrive in the highly competitive financial services industry. The goal of this session is to empower each attendee with a high-level understanding of the key industry and project trends and how these impact the ability to thrive in the highly competitive Financial Services Industry.	**1:00 PM – 1:45 PM**	**AI Ready: Building a Smarter Credit Union for 2025 and Beyond** *Presented by: Anne Legg, THRIVE Strategic Services* Is your credit union ready for the AI-driven future? This session explores the five essential elements every credit union needs on its AI roadmap to drive growth, efficiency, and member engagement in 2025 and beyond. Discover how to harness the power of data and artificial intelligence to enhance decision-making, personalize member experiences, and stay competitive in a rapidly evolving landscape. Attendees will gain a clear AI readiness checklist and practical insights into operationalizing AI initiatives. You'll learn how to integrate AI into your credit union's unique operations through real-world examples and actionable strategies, creating scalable solutions that align with your strategic goals. Don't miss this opportunity to empower your team with the knowledge and tools to embrace AI innovation and position your credit union for long-term success.
1:45 PM – 2:30 PM	**Automate to Innovate: Harnessing the Power of Digital Tools** *Presented by: Jason Elrod ,AvidXchange* Ready to elevate your credit union's operational performance? In an era where security threats and manual processes can hinder growth, this session will illuminate how embracing accounts payable (AP) automation and digital solutions can drive significant improvements. We'll explore practical strategies to improve operational efficiency, reduce manual errors, and empower your team to focus on higher-value tasks. Stay ahead of the curve with this discussion on emerging trends in technology and ways your credit union can adapt to succeed in an increasingly digital world. Don't miss this opportunity to transform your operations and drive performance—your credit union's future depends on it!.	**1:45 PM – 2:30 PM**	**Data at the Core: Credit Union Insights on Data Hub, Data Management, and Data Strategies** *Facilitated by: Joe Peyton, Redwood CU, Michelle Hatton, Solarity CU* Discover how credit unions are using data to drive smarter decisions, enhance member experiences, and stay ahead of industry trends. Panelists will share their data strategies, including best practices for leveraging analytics, optimizing operations, and making data-driven decisions that deliver results. Gain valuable insights into the evolving role of data in the credit union space.
2:30 PM – 2:45 PM	**Break Sponsored by:** BDI business data inc		
2:45 PM – 3:30 PM	**GL Open Forum** *Facilitated by: Eril Blackwood, The Eril Consult* Join us for a practical session on Symitar GL topics, including regulatory reporting (5300 & FR2900), transaction posting configurations, balancing, period-end closing, and how to get useful answers from Symitar support. Bring your questions and challenges as we explore solutions for navigating the GL with confidence.	**2:45 PM – 4:00 PM**	**Code in Control: Best Practices for Code Control and Managing Custom Solutions** *Presented by: Kristie Allen, Jack Henry* Join us for a deep dive into Custom Solutions SDLC and the best industry practices for managing code. We'll cover the essentials, share proven strategies, and then open the floor for a roundtable discussion where you can learn from others' experiences and share your own insights on keeping your codebase clean, efficient, and scalable.
3:30 PM – 4:00 PM	**Discover the New Symitar Support Structure** *Facilitated by: Scott Murray & Jordan Urso, Jack Henry* You've spoken, and we've listened! Symitar's support has undergone a transformation, but rest assured, we've retained all the elements you love. Join us for this insightful session where Scott Murray will walk you through the exciting changes and what they mean for you. Learn about the new features, improvements, and what's on the horizon. Don't miss out on this opportunity to stay informed and get the most out of Symitar's enhanced support system		

Happy Hour from 5:00 – 7:00PM in the Mt Hood Room (2nd Floor of the Marriott)
Vendors are welcome to attend, cash bar available
Sponsored by:

CELEBRATING 20 YEARS CUTEK   mahalo BANKING

Friday, May 9th, 2025
8:30 am – Noon

8:00 AM – 9:00 AM	**Continental Breakfast Sponsored by:**
9:00 AM – 9:45 AM	**Innovations in Action: iQ CU's Cool New Projects and Developments** *Presented by: Dan Querciagrossa, iQ CU* Join Dan as he showcases some of the initiatives they've been working on. From innovative solutions to cutting-edge projects, this session offers a sneak peek at the cool stuff iQ CU is bringing to the table. Get inspired by their progress and learn about the fresh ideas driving their success.
9:45 AM – 10:30 AM	**Digital Banking, SDKs, and Cool Customizations** *Facilitated by: Jen Shefner, SELCO Community CU, Havre Hamilton, NASA Federal Credit Union* Learn how credit unions are enhancing digital banking by customizing self-service options and features to better meet member needs. Panelists will share their strategies for leveraging SDKs, partnering with vendors, and using innovative solutions to stay competitive in a fast-evolving digital landscape. Discover real-world examples and key takeaways for driving success in digital banking.
10:30 AM – 11:00 AM	**Vendor Expo & Networking Sponsored by:**
11:00 AM – 11:20 AM	**CU Build** *Presented by: Mike Blumenthal, CU Build* CU Build is a team of credit union volunteers hosting a first of its kind cross-credit union build-a-thon on the Symitar ecosystem. A build-a-thon is an event where programmers, business experts, and other innovators get together to solve real-world problems in a sandbox environment that has access to cutting edge tools, services, and platforms. The team is excited to share with you plans for the 2020 build and ways in which you can get involved. Learn about the event, what to expect and what CU Build is hoping to achieve with this groundbreaking initiative.
11:20 AM – 11:30 AM	**Cobalt Awards** *Presented by: Kristie Allen, Jack Henry* The Cobalt Awards is an annual recognition program that celebrates outstanding financial institution and fintech innovation, dedication to people and communities, and a passion for reducing the barriers to financial freedom. The Cobalt Awards are an opportunity for financial institutions and fintechs to earn recognition for their creativity and imagination while also giving back to their communities. Learn how your FI can get involved.
11:45 AM – Noon	**The Early Bird Gets the Paycheck: Exploring Early Direct Deposit** *Facilitated by: James Burke-Frazier, Symitar & his volunteer voluntolds* This roundtable discussion will focus on all things Early Direct Deposit! We'll chat about who's already making it happen, how they're rolling it out, and the impact it's having on both employers and employees. Whether you're curious or already on board, come learn how early paychecks are changing the way we think about paydays!