



Wednesday, May 6, 2026  
8:00 am – 4:00 pm

8:00 AM – 9:00 AM	<b>Registration</b> <b>Continental Breakfast sponsored by:</b> 	
9:00 AM – 9:45 AM	<b>What's New at Your CU</b> This is your chance to meet the other attendees and find out what everyone is working on.	
9:45 AM – 10:15 AM	<b>SymWest Keynote Address &amp; Symitar Update</b> <i>Presented by: Brandon Sproat, Jack Henry</i>	
10:15 AM – 10:45 AM	<b>Vendor Rapid Fire</b> 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	<b>Vendor Tech Expo</b>	
11:15 AM – 12:00 PM	<b>I Don't Like People I Don't Know: How to flourish in the conference landscape</b> <i>Presented by: Kristie Allen, Jack Henry</i> How to survive and thrive in a conference setting when you'd really rather go back to your room instead of mingling with people you don't know. You know who you are. Confessions of an introvert who masquerades as an extrovert.	
12:00 PM – 1:00 PM	<b>LUNCH Sponsored by:</b>   	
<b>Track 1 – Operations/Management</b>		
1:00 PM – 1:45 PM	<b>AI, RPA, and Automation: What Credit Unions Need to Know (and Avoid)</b> <i>Presented by: Greg Varnell, Hapax AI</i> AI, RPA, and automation are often used interchangeably, leading to confusion and missed opportunities. This session clarifies the differences using real-world banking examples and shows where each approach works best in regulated environments. Attendees will learn how to evaluate automation opportunities, understand risk, and make smart, strategy-driven decisions beyond the hype.	
1:45 PM – 2:30 PM	<b>Is Your CRM/MRM Also a Data Platform?</b> <i>Presented by: Jason Bedsworth, CFS Insight</i> Many credits unions are increasingly investing in the next generation of CRM's (also referred to as Member Relationship Management systems or MRMs). These projects have an increasing data component to their implementation and success. As such many CRM solution providers have sold their solutions as a CRM that includes a data platform that can also serve as the data platform for the entire credit union. If not careful, these implementations can explode in cost and while failing to delivery on the promises made to Credit Union leadership. Learn from the real-world experiences of others to help your credit union be successful in effectively managing the data component of your CRM.	
2:30 PM – 2:45 PM	<b>Break Sponsored by:</b> 	
<b>Track 2 – Programming/Technical</b>		
1:00 PM – 1:45 PM	<b>Symitar Customization: Friend or Foe?</b> <i>Presented by: Kristie Allen, Jack Henry</i> A roundtable discussion on things to consider when deciding to customize Symitar. How much customization is too much? How to manage your custom code. Strategies for unwinding custom code and getting back to standard functionality.	
1:45 PM – 2:30 PM	<b>Code Encounters of a Third Kind – Making SDLC (Software Development Lifecycle) Work for You</b> <i>Presented by: Technology Happens</i> This Breakout Session will be a 45-minute interactive discussion about what an effective Software Development Lifecycle (SDLC) is and how it can be used to improve the results Credit Unions need from their technology projects and programs. Many Credit Unions lack a robust SDLC, which leads to projects and programs that fail to reach their full potential. While no advance preparation is needed, attendees are encouraged to come prepared to actively engage to learn, ask questions, and leave with knowledge and understanding that can be applied immediately to help their organization evolve.	
<b>Track 1 – Operations/Management</b>		
2:45 PM – 3:30 PM	<b>Exploring Member and Employee Expectations in the Age of AI</b> <i>Presented by: Karan Kashyap, Posh</i> As generative AI continues to evolve, credit unions have a unique opportunity to put it to work in meaningful ways. In this updated session, Karan will share the latest trends in generative and agentic AI for 2025 and what they mean for credit unions. Learn how these technologies are enhancing member experiences, streamlining operations, and empowering employees, with real-world examples and practical strategies to help your credit union stay competitive in an AI-driven landscape.	
3:30 PM – 4:00 PM	<b>Powering Business Banking: A Symitar Commercial Services Refresher</b> <i>Presented by: Sherrie Arruda, Jack Henry &amp; KayCee Murray, Numerica CU</i> Get reacquainted with the Symitar tools that support your commercial and business banking services. This refresher session covers essential functionality such as analyzed accounts, sweeps, and loan processing, with a focus on practical use and day-to-day operations.	
<b>Track 2 – Programming/Technical</b>		
2:45 PM – 4:00 PM	<b>We Are Not Alone: Navigating the Digital Landscape</b> <i>Presented by: Mike Blumenthal &amp; Brad Moritz, Technology Happens, Dylan Matthews, America's Credit Union</i> This highly interactive session will be a roundtable panelist format facilitated by Technology Happens and various Credit Unions. The session is expected to include 5-6 discussion Hot Topics, with three pre-defined and three suggested by the panelists and attendees. The panelists will be selected and invited by Technology Happens from its base of key clients. Technology Happens and the panelists will share their direct knowledge and real-world experience in order to offer insights and recommendations for some of the most pressing issues confronting Credit Unions today	

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

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8:00 AM – 9:00 AM	 <b>Continental Breakfast Sponsored by:</b>	
9:00 AM – 9:45 AM	<b>Platform Update &amp; Operational Walkthrough</b> <i>Presented by: Kristin Travis &amp; James Burke-Frazier, Jack Henry</i> Join us for a session providing a high-level update and an operational walkthrough of key Platform components. We will cover an overview of the Platform pieces and their current state, a high-level look at technology modernization efforts, and a focused walkthrough of SSDB and Data Hub. This session is designed to deliver a comprehensive, high-level understanding of the platform's operational landscape.	
9:45 AM – 10:30 AM	<b>Moov: Rapid Transfers and Tap2Local</b> <i>Presented by: Brett Sinn, Jack Henry</i> Tired of FinTechs "drinking your milkshake?" Discover how Jack Henry Rapid Transfers and Tap2Local empower your Credit Union. We'll show you how to offer near-instant money movement and streamlined tap-to-pay functionality, helping you secure deposits and keep funds local.	
10:30 AM – 11:00 AM	<b>Vendor Tech Expo</b>	
11:00 AM – 11:55 AM	<b>The Good, the Bad, and the Phishy</b> <i>Presented by: Jim Stickley, Stickley on Security</i> Cybersecurity doesn't have to be boring. Jim Stickley brings humor and real-world stories together to show how attacks actually happen, why smart people still get fooled, and what credit unions can do to stay ahead without losing their minds.	
12:00 PM – 1:00 PM	<b>LUNCH Sponsored by:</b>  	
<b>Track 1 – Operations/Management</b>		<b>Track 2 – Programming/Technical</b>
1:00 PM – 1:45 PM	<b>Beyond the Buzzwords: How to Use AI and RPA Effectively and Responsibly</b> <i>Presented by: Continuous</i> Not every process needs AI and not every workflow challenge can be solved with RPA. Join the automation experts at Continuous for a breakdown of where each technology fits, how they complement each other, and how to deploy them responsibly and avoid costly missteps. We'll spotlight real-world examples of RPA and AI in action and provide a framework for choosing the right tool for the job. Find out how credit union leaders and operations teams are using both, so you can identify where these tools can save you valuable time, increase cost savings, and relieve your team of operational headaches.	<b>1:00 PM – 2:30 PM</b> <b>PowerFrame Training (1/2 Day) Part 1</b> <i>Presented by: Kristin Travis, Jack Henry</i> Join us for a this session talking all things PowerFrame Docs! During the session, we will cover the basics for PowerFrame Docs within Quest and the PowerFrame Design Portal. We'll spend most of our time getting hands on with a PowerFrame Doc. This year we'll be covering how to use custom JavaScript in your forms! We'll talk about some commonly used JavaScript functions and the PFrame API. We'll briefly cover new PowerFrame Docs features and planned roadmap items as well. Throughout the session we encourage questions and open discussion so you can learn how your peers are using PowerFrame Docs. The PowerFrame Docs Pre-Conference class is targeted to newbies and experts alike.
1:45 PM – 2:30 PM	<b>The Wake-Up Call for Collections &amp; Recoveries</b> <i>Presented by: FIntegrate</i> Consumer delinquencies may be "stabilizing," but at levels far higher than pre-pandemic norms, creating a permanent workload reset for collections and recovery teams. The real risk today is no longer borrower credit quality - it is operational breakdown caused by fragmented systems, manual workflows, and compliance enforced by people instead of technology. This session will explain why elevated delinquencies, charge-offs, and bankruptcies multiply regulatory and financial risk when operations cannot scale safely. Attendees will gain practical insight into how leading banks and credit unions are modernizing collections and recovery operations to maintain control, compliance, and profitability.	
2:30 PM – 2:45 PM	<b>Break Sponsored by:</b> 	
2:45 PM – 4:00 PM	<b>Getting the Most out of Your Symitar Goodnight &amp; Month End Processing</b> <i>Facilitated by: Rae Huch, Jack Henry</i> Refresher training on best practices for Purging, Goodnight & EOM batch processing, job structuring, and report offloading – with an emphasis on optimizing critical processes to reduce Goodnight & EOM run times. Practical examples from clients who partnered with Symitar Client Support in making GN/EOM processing more efficient.	<b>2:45 PM – 4:00 PM</b> <b>PowerFrame Training (1/2 Day) Part 2</b> <i>Presented by: Jack Henry</i> Continuation of PowerFrame training with hands on experience.

Happy Hour from 5:00 – 7:00PM

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**Friday, May 8th, 2026  
8:30 am – Noon**

<b>8:00 AM – 9:00 AM</b>	<b>Continental Breakfast Sponsored by:</b> 
<b>9:00 AM – 9:45 AM</b>	<b>Remote Leadership Roundtable</b> <i>Presented by: Dave Covell, WPCCU</i> Hybrid and remote work are here to stay, but there's no one-size-fits-all playbook. In this interactive session, WPCCU will walk through how they've approached remote work, kept culture alive, and used technology to engage a mostly remote team. Come ready to share what's working for you, what's not, and swap real-world tips with peers who are figuring it out too.
<b>9:45 AM – 10:30 AM</b>	<b>How to Use AI: Practical Skills for the Modern Professional</b> <i>Presented by: Adele Glenn, Cutek</i> This session provides a comprehensive, hands-on introduction to using Artificial Intelligence effectively, responsibly, and creatively in everyday work. Designed for participants of all technical levels, the presentation demystifies AI tools, explains core concepts in plain language, and demonstrates practical workflows that improve productivity, decision-making, and innovation.
<b>10:30 AM – 11:00 AM</b>	<b>Vendor Expo &amp; Networking Sponsored by:</b> 
<b>11:00 AM – 11:45 AM</b>	<b>Hard Things, Done Well: Automating the Decedent Process</b> <i>Presented by: Crystal Ayton &amp; Pat Johnson, Numerica CU</i> Managing a decedent account is complex and time sensitive. Numerica Credit Union will walk through how they modernized this process by automating workflows, providing real-time status visibility, and routing work to the right teams, creating a more consistent and compassionate experience for both staff and families.
<b>11:45 AM – Noon</b>	<b>CU Build</b> <i>Presented by: Mike Blumenthal, CU Build</i> 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 CU 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.