



# POCKET PROGRAM

INDIANA CREDIT UNION LEAGUE  
ANNUAL MEETING & CONVENTION

September 30-October 2, 2026  
JW Marriott • Indianapolis

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## KEYNOTE

### THURSDAY, OCTOBER 1

#### Keynote Address: Unlock the Power of Your People: The “Core Four” Stages of Adult Development Theory

Presented by Arel Moodie,  
Keynote Speaker/Co-Founder, Talkadot  
8:30 a.m., White River Ballroom F-J



As we adapt to a rapidly changing world, people problems can be the most complex and critical challenges we face, but they don't have to be. Humans are not chaotic, they are predictable. That means all adults pass through sequential stages of development that feature different fears, motivators, and goals. By constructively exploring these stages, we can transform our understanding of ourselves AND each other.

In this interactive, entertaining, and highly actionable keynote, former Disney+ expert host, tech founder, and Adult Development Theory expert Arel Moodie introduces the overlooked science of human potential to help us Build People Power™ inside our organizations like never before. You'll walk away with a clear understanding of how to predict and drive certain behaviors, no matter which stage someone is in.

*Keynote Address is sponsored by **Forvis Mazars**.*

***These codes under the Session Profile of Thursday and Friday breakout sessions indicate which track(s) each session is part of:***

**CUP = Credit Union Professionals Track**

**EL = Emerging Leaders Track VO = Volunteers Track**

# EDUCATION SESSIONS

THURSDAY, OCTOBER 1 - 10 A.M. and 2:15 P.M.

## A.M. Session ONLY: Unlock the Power of Your Team: How to Create the Ultimate Work Environment

In times of challenge and change, success isn't just about WHAT stands in front of us, it's about WHO stands beside us. But without prioritizing team development, individuals can start seeing each other as rivals instead of teammates, leading to unnecessary conflict and competition. When we strengthen how we relate, we transform motivation, direction, and build powerful units capable of fighting the same problems together.

In this interactive, humor-filled, and inspirational presentation, former Disney+ expert host and lifetime entrepreneur Arel breaks down how people can move away from an "us versus them" mindset to create more connected teams who work, and win, together.

By delivering an unforgettable shared experience, Arel leaves teams energized and inspired, ready to unlock their full potential and power.

Presented by **Arel Moodie**, Keynote Speaker/Co-Founder, Talkadot

### SESSION PROFILE

**Speaker:** Arel Moodie

**Date:** Thursday, Oct. 1

**Time:** 10 a.m. ONLY

**Room:** White River Ballroom E

**Tracks:** CUP, EL, VO

## A Path To Future Relevancy With The Strategic Growth Framework

What if your credit union members were as passionate about your institution as Taylor Swift's fans are about her music? What if your employees felt empowered to drive real change, and your growth wasn't just about numbers — but about making a lasting impact on your community?

In this powerful, thought-provoking session, we'll explore the Strategic Growth Framework, a model that puts purpose at the heart of credit union success. By focusing on empowered employees, engaged members, stakeholder impact, and sustainable growth, this approach is transforming the way credit unions compete, connect, and thrive in an industry that's always evolving.

**Key Takeaways:** Understand what the Strategic Growth Framework is and why it matters. Learn practical ways to start using the framework in your own strategic planning. Explore real-world case studies of credit unions thriving through purpose-driven strategies.

Presented by **Alexandra Gekas**, VP Marketing & Engagement, Callahan & Associates

### SESSION PROFILE

**Speaker:** Alexandra Gekas

**Date:** Thursday, Oct. 1

**Time:** 10 a.m. & 2:15 p.m.

**Room:** 103-104

**Tracks:** CUP, EL, VO

## Cutting Through the AI Hype for Credit Union Marketers

Our discussion of AI skips past the buzzwords, hype and impossible promises to focus on the specific, real-world, right-now ways credit union marketers can responsibly use AI to be more effective while preserving that essential human spark. You'll walk away with a framework for getting started with AI tools, and for understanding, evaluating, and safely experimenting with AI in CU marketing. And of course, we'll cover what members need and expect from your credit union's use of AI, including transparency, safety, and human accountability and control.

Presented by **Sam Dicken**, COO, and **Brian Wringer**, CEO/Big Idea Guy, both of iDiz Incorporated

### SESSION PROFILE

**Speakers:** Sam Dicken & Brian Wringer  
**Date:** Thursday, Oct. 1  
**Time:** 10 a.m. & 2:15 p.m.  
**Room:** White River Ballroom C  
**Tracks:** CUP, EL, VO

## Digital Engagement Blueprint: From Clicks to Member Connection

This session brings together the essential pillars of a successful digital presence: building a thoughtful strategy, maximizing visibility, creating meaningful member experiences, and identifying the best moments to engage. Think of it as tending a thriving digital ecosystem - where careful planning, visibility, empathy, and timing work in harmony. You'll learn practical tools and tactics to grow your digital impact steadily, stand out in the crowded marketplace, understand your members' evolving needs, and connect at the right time for maximum receptivity.

**Key Takeaways:** Success in the digital world isn't just about speed, it's about strategy, visibility, empathy, and timing. Small, intentional steps create lasting connections and wins that matter.

Presented by **Philip Perschetz**, Lead Consultant/Digital Capabilities, Lending Member Experience, TruStage

### SESSION PROFILE

**Speaker:** Philip Perschetz  
**Date:** Thursday, Oct. 1  
**Time:** 10 a.m. & 2:15 p.m.  
**Room:** White River Ballroom D  
**Tracks:** CUP, EL

## Economic Update by Visa

The consensus view is that the U.S. is likely to avoid a recession this year but there are some important risks to that outlook. In this session Visa's U.S. Economist, Travis Clark, will present an outlook for economic growth, as well as the labor market and other factors that are influencing the consumer landscape.

### SESSION PROFILE

**Speaker:** Travis Clark  
**Date:** Thursday, Oct. 1  
**Time:** 10 a.m. & 2:15 p.m.  
**Room:** 101-102  
**Tracks:** CUP, EL

The outlook will also include a perspective on the future of monetary and fiscal policy as well as important factors influencing the Indiana economy.

Presented by **Travis Clark**, U.S. Economist, VISA

## Future Ready Board; AI & Analytics for Non-Technologists

This session will list and define common terms and concepts for the evolving world of credit union data, including the common use of AI terminology & analytics with practical application. The pace of change around data, AI, & analytics is increasing, develop an initial understanding for strategic growth.

Presented by **James Gukeisen**, Leagues & Advocacy Director, Trellance

### SESSION PROFILE

**Speaker:** James Gukeisen

**Date:** Thursday, Oct. 1

**Time:** 10 a.m. & 2:15 p.m.

**Room:** White River Ballroom B

**Track:** VO

## P.M. Session ONLY: Leadership Panel

A panel of CU executives will discuss their leadership paths and what traits they look for in developing future leaders within their credit unions.

Facilitated by **John McKenzie**, CEO,  
Indiana Credit Union League

### SESSION PROFILE

**Facilitator:** John McKenzie

**Date:** Thursday, Oct. 1

**Time:** 2:15 p.m. ONLY

**Room:** White River Ballroom E

**Track:** EL

## THURSDAY, OCTOBER 1 - 3:30 P.M.

### BSA for Volunteers

For volunteers, Bank Secrecy Act (BSA) training is a must. Regulators continue to expect you to understand BSA requirements, and they can hold you personally liable for non-compliance. Punishment for non-compliance can be expensive: monetary fines, forced mergers and volunteer prohibition orders. This session will provide you with tips to assure your credit union's compliance, an understanding of the necessary human and monetary resources and an overview of the following requirements: risk assessments; policies and procedures; independent testing; education requirements; OFAC searches; and monitoring necessities, especially for anti-money laundering.

Presented by **Joyce Ingle**, Senior Consultant, Indiana Credit Union League

### SESSION PROFILE

**Speaker:** Joyce Ingle

**Date:** Thursday, Oct. 1

**Time:** 3:30 p.m.

**Room:** 101-102

**Track:** VO

## FRIDAY, OCTOBER 2 - 9 A.M. AND 2:15 P.M.

### A.M. Session ONLY:

#### Cooperative Power

Renee Sattiewhite believes strongly that credit unions make a difference in the lives of people. She also believes that the reason credit unions will continue to do well for people in the future is that they are structured as cooperative business organizations. They have Cooperative Power. For that reason, it is important that credit unions and their support organizations do what it takes to advance the cooperative business charter and expand the U.S. cooperative ecosystem. The starting place is for credit union leaders to believe that Cooperative Power is a significant key to their success.

Presented by **Renée Sattiewhite**, Preident/CEO, African American Credit Union Coalition (AACUC)

#### SESSION PROFILE

**Speaker:** Renée Sattiewhite  
**Date:** Friday, Oct. 2  
**Time:** 9 a.m. ONLY  
**Room:** White River Ballroom C  
**Tracks:** CUP, EL, VO

#### What matters now: Insights from TruStage's Multicultural and Multigenerational Financial Needs and Behaviors Study

Developing a successful multicultural business strategy (MCBS) can be challenging for credit union leaders. A deep understanding of your membership and communities through a multicultural and mutigenerational lens can help. Through an exploration of our What Matters Now research report, gain data, insights and action steps to help you understand the motivations, struggles, hopes and dreams of people across race, ethnicity and generation. The report was developed with a credit union focus and includes contributions from nearly 10,000 multicultural and multigenerational participants across the country, all with the goal of helping you advance your MCBS to better serve your members and surrounding communities.

**Key Takeaway:** Utilize data and insights from a comprehensive study to develop a successful multicultural business strategy, understanding the varied motivations and aspirations across different ethnic and generational groups.

Presented by **Edgar Hernandez**, Principal – Multicultural & DEI Advisory Services, TruStage

#### SESSION PROFILE

**Speaker:** Edgar Hernandez  
**Date:** Friday, Oct. 2  
**Time:** 9 a.m. & 2:15 p.m.  
**Room:** White River Ballroom A  
**Tracks:** CUP, EL

## NCUA Examiner Hot Buttons

The NCUA will give updates and changes happening in 2026 and at the beginning of 2027.

Presented by **Aaron Burton**, Supervisory Examiner, NCUA, Southern Region

### SESSION PROFILE

**Speaker:** Aaron Burton

**Date:** Friday, Oct. 2

**Time:** 9 a.m. & 2:15 p.m..

**Room:** White River Ballroom D

**Tracks:** CUP, EL, VO

## Cyber Threats and Criminal Trends by Secret Service

This session will offer an examination from the Secret Service of the current cyber-fraud threat landscape, helping attendees understand trends from a law enforcement perspective as well as the capabilities of the Indianapolis Cyber Fraud Task Force.

Presented by **Christian Ebel-Orr**, Technical Special Agent, Secret Service

### SESSION PROFILE

**Speaker:** Christian Ebel-Orr

**Date:** Friday, Oct. 2

**Time:** 9 a.m. & 2:15 p.m..

**Room:** 101-102

**Tracks:** CUP, EL, VO

## The Habit of Accountability

Accountability is not a single conversation—it is a habit built through consistent leadership behaviors. In this practical and interactive session, participants will learn how to create accountability before problems occur by setting clear expectations, aligning outcomes, delegating to build capability, and having conversations that strengthen performance and trust. Rather than relying on reminders or micromanagement, leaders will leave with practical tools to build a culture where ownership becomes the norm and follow-through becomes part of the team's daily rhythm.

Presented by **MeChelle Callen**, Director of Learning & Development, Purple Ink LLC

### SESSION PROFILE

**Speakers:** MeChelle Callen

**Date:** Friday, Oct. 2

**Time:** 9 a.m. & 2:15 p.m.

**Room:** White River Ballroom B

**Tracks:** CUP, EL, VO

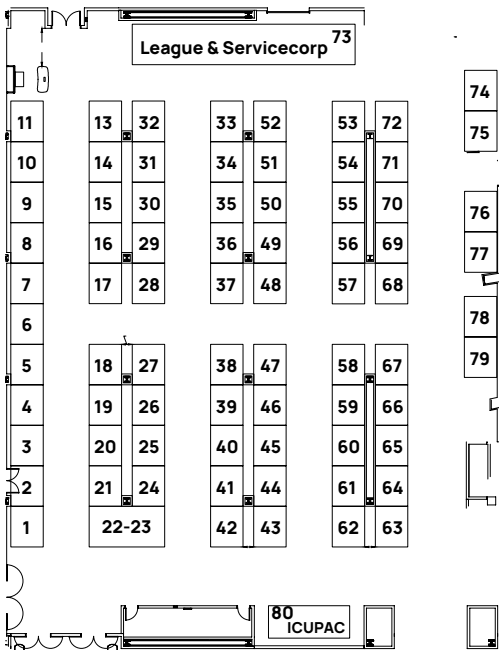
# AGENDA

*Premier Sponsors are TruStage and Servicecorp.*

| TIME/EVENT                                                                                                                                                                                                                               | LOCATION                                                             |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|
| <b>WEDNESDAY, SEPTEMBER 30</b>                                                                                                                                                                                                           |                                                                      |
| 1 – 3:30 p.m.<br>CFO Roundtable                                                                                                                                                                                                          | Room 101-102 (1 <sup>st</sup> floor)                                 |
| <i>Sponsored by Forvis Mazars</i>                                                                                                                                                                                                        |                                                                      |
| 1 – 3:30 p.m.<br>Human Resources Roundtable                                                                                                                                                                                              | Room 103-104 (1 <sup>st</sup> floor)                                 |
| 1 – 3:30 p.m.<br>Marketing Roundtable                                                                                                                                                                                                    | White River C-D (1 <sup>st</sup> floor)                              |
| <i>Sponsored by Visa</i>                                                                                                                                                                                                                 |                                                                      |
| 1 – 6:30 p.m.<br>Welcome Room                                                                                                                                                                                                            | Griffin Exhibit Hall Foyer &<br>Room 201-204 (2 <sup>nd</sup> floor) |
| <i>Sponsored by Delta Dental</i>                                                                                                                                                                                                         |                                                                      |
| 12:30 – 7 p.m.<br>Registration and Information Center                                                                                                                                                                                    | Griffin Exhibit Hall Foyer<br>(2 <sup>nd</sup> floor)                |
| 3:30 – 6:30 p.m.<br>Convention Grand Opening                                                                                                                                                                                             | Griffin Exhibit Hall (2 <sup>nd</sup> floor)                         |
| <i>Bar/Drink Tickets sponsored by K4 Architecture + Design;<br/>Strategic Resource Management; Titan Armored;<br/>Weltman, Weinberg &amp; Reis Co., LPA<br/>Light snacks/refresments sponsored by Corporate Central CU and QSI, Inc.</i> |                                                                      |
| 4:30 p.m.<br>Welcome Remarks: Cari Palmer,<br>League Events Committee Chair                                                                                                                                                              | Griffin Exhibit Hall (2 <sup>nd</sup> floor)                         |
| 6 – 6:15 p.m.<br>Be present to win prize drawing                                                                                                                                                                                         | Griffin Exhibit Hall (2 <sup>nd</sup> floor)                         |
| <b>THURSDAY, OCTOBER 1</b>                                                                                                                                                                                                               |                                                                      |
| 7:30 a.m. – 3:30 p.m.<br>Registration and Information Center                                                                                                                                                                             | Griffin Exhibit Hall Foyer<br>(2 <sup>nd</sup> floor)                |
| 7:30 a.m. – 3:30 p.m.<br>Welcome Room                                                                                                                                                                                                    | Griffin Exhibit Hall Foyer &<br>Room 201-204 (2 <sup>nd</sup> floor) |
| <i>Sponsored by Delta Dental</i>                                                                                                                                                                                                         |                                                                      |
| 7:30 – 8:15 a.m.<br>Continental Breakfast                                                                                                                                                                                                | Griffin Exhibit Hall Foyer<br>(2 <sup>nd</sup> floor)                |
| <i>Sponsored by Trellance</i>                                                                                                                                                                                                            |                                                                      |
| 8:30 – 9:30 a.m.<br>Opening Keynote: Arel Moodie                                                                                                                                                                                         | White River Ballroom F-J<br>(1 <sup>st</sup> floor)                  |
| <i>Sponsored by Forvis Mazars</i>                                                                                                                                                                                                        |                                                                      |
| 10 – 11 a.m.<br>Education Sessions                                                                                                                                                                                                       | White River B, C, D, E; Rooms<br>101-102; 103-104                    |
| 11 a.m. – 2 p.m.<br>Exhibit Hall                                                                                                                                                                                                         | Griffin Exhibit Hall (2 <sup>nd</sup> floor)                         |

| TIME/EVENT                                                                                                                                                                                                       | LOCATION                                                                                  |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|
| 11 a.m. – 1 p.m.<br>Lunch served in the Exhibit Hall<br><i>Sponsored by ASI/ESI</i>                                                                                                                              | Griffin Exhibit Hall (2 <sup>nd</sup> floor)                                              |
| 2:30 – 3 p.m.<br>Be present to win prize drawing                                                                                                                                                                 | Griffin Exhibit Hall (2 <sup>nd</sup> floor)                                              |
| 2:15 – 3:15 p.m.<br>Repeat of 10 a.m. sessions, except where noted                                                                                                                                               | White River B, C, D, E; Rooms 101-102; 103-104                                            |
| 3:30 – 4:30 p.m.<br>BSA for Volunteers                                                                                                                                                                           | Room 101-102 (1 <sup>st</sup> floor)                                                      |
| 4 – 5 p.m.<br>CEO Reception ( <i>All CU CEOs are invited.</i> )<br><i>Sponsored by Alloya Corporate FCU, Corporate Central CU, Corporate One FCU, Member First Mortgage and Visa</i>                             | Off-site: Eiteljorg Museum, Allan Whitehill Clowes Sculpture Court, 500 W. Washington St. |
| 5 – 6 p.m.<br>Emerging Leaders Reception<br>( <i>All CU Emerging Leaders are welcome.</i> )<br><i>Sponsored by Alloya Corporate FCU, Corporate Central CU, Corporate One FCU, Member First Mortgage and Visa</i> | Off-site: Eiteljorg Museum, Allan Whitehill Clowes Sculpture Court, 500 W. Washington St. |
| 8:30 – 10:30 p.m.<br>Alloya Live! Drinks, Hors d'oeuvres, and Music<br><i>Sponsored by Alloya Corporate FCU</i>                                                                                                  | White River Ballroom E (1 <sup>st</sup> floor)                                            |
| FRIDAY, OCTOBER 2                                                                                                                                                                                                |                                                                                           |
| 7:30 – Noon<br>Registration and Information Center                                                                                                                                                               | White River Ballroom Foyer (1 <sup>st</sup> floor)                                        |
| 7:45 – 9 a.m.<br>Indiana Credit Union Foundation Breakfast<br>(Brief Remarks at 8:30 a.m.)<br><i>Sponsored by Corporate One FCU</i>                                                                              | White River Ballroom E (1 <sup>st</sup> floor)                                            |
| 9 – 10 a.m.<br>Education Sessions                                                                                                                                                                                | White River Ballrooms A, B, C, D; Room 101-102 (1 <sup>st</sup> floor)                    |
| 10:15 a.m. – 11:50 a.m.<br>League Annual Business Meeting                                                                                                                                                        | White River Ballroom F-J (1 <sup>st</sup> floor)                                          |
| Noon – 2 p.m.<br>Advocacy Luncheon                                                                                                                                                                               | White River Ballroom E (1 <sup>st</sup> floor)                                            |
| 2:15 – 3:15 p.m.<br>Repeat of 9 a.m. Education Sessions                                                                                                                                                          | White River Ballrooms A, B, D; Room 101-102 (1 <sup>st</sup> floor)                       |
| 5:45 – 8 p.m.<br>Registration and Information Center                                                                                                                                                             | White River Ballroom Foyer (1 <sup>st</sup> floor)                                        |
| 6 – 9 p.m.<br>Indiana Credit Union Awards Celebration<br><i>Sponsored by TruStage and Servicecorp</i>                                                                                                            | White River Ballroom F-J (1 <sup>st</sup> floor)                                          |

## EXHIBITOR MAP & KEY



\*Denotes endorsed business partners of the League/Servicecorp.

| BOOTH | EXHIBITOR/DESCRIPTION                                                                                                                                                                                                                                                                        |
|-------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5     | <b>Acumen Financial Advantage:</b> From executive retention and balance sheet-driven yield optimization to advancing long-term community value, everything we do is engineered to help you deploy capital more efficiently and achieve sustainable results in a changing market environment. |
| 38    | <b>ADVANTAGE, powered by JMFA*:</b> We turn operational complexity into measurable growth with compliant overdraft strategies, data-driven account acquisition, contract optimization, and compliant communication automation.                                                               |
| 21    | <b>AKUVO:</b> We help credit unions reduce delinquency and shape the future of collections with intelligent, data-driven technology built for a more proactive, member-first approach.                                                                                                       |

36

**Allied Solutions, LLC:** We are a leading provider of insurance, lending, risk management, and data-driven solutions, serving over 6,000 financial institutions across North America with customized, technology-based products and services.

24

**Alloya Corporate FCU:** We are a leading provider of cooperative financial services to over 1,300 credit unions and credit union entities nationally. Through the Power of Cooperation, the member-owners of Alloya can access the best products and services in the industry.

42

**American Share Insurance / Excess Share Insurance:**

Indiana credit unions have a choice when it comes to protecting their members' deposits. Choose private share insurance from ASI. ESI adds deposit insurance above the NCUA's limits up to \$10,000,000 per tax id.

68

**Angott Search Group:** Since 1981, we have helped credit unions identify and recruit high-impact leaders from mid-management through the C-suite.

60

**Brown & Brown:** We are a boutique practice within a national firm that specializes in executive benefits, BOLI, and fee income strategies to assist Credit Unions to value people and improve earnings while protecting assets. Let's have a conversation.

44

**Campio Insurance Solutions:** We help credit unions strengthen member and institutional protection through independent insurance guidance, strategic risk reviews, and access to broad personal and commercial insurance solutions powered by Acrisure.

41

**CFS Title:** Commercial and Consumer: We offer title search & exam title insurance, mobile closing, AVMs, and appraisal management.

69

**Cornelius Systems:** Since 1971, we have helped banks, credit unions, and retailers streamline transactions through innovative automation solutions. We deliver best-in-class technology, expert service, and trusted partnerships to reduce costs and much more.

37

**Corporate Central Credit Union:** We provide best-in-class investment, liquidity, settlement, and technology solutions to credit unions.

62

**Corporate One FCU:** We lead the way in providing premier investment, funding, and payment solutions, elevating and empowering credit unions to fuel their members' financial success.

73

**Credit Union Centers:** We offer shared branching solutions for credit unions.

59

**CU\*Answers:** We are a 100% credit union-owned cooperative CUSO, providing technology solutions for credit unions to grow and aggressively compete. This includes its flagship CBX® processing system and more.

\*Denotes endorsed business partners of the League/Servicecorp.

|    |                                                                                                                                                                                                                                                                                                       |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 72 | <b>CUES:</b> We provide credit union education and talent development.                                                                                                                                                                                                                                |
| 45 | <b>Datum Evolve:</b> We are a Hyland Authorized Partner specializing in OnBase content management, workflow automation, and ECM consulting for credit unions. We fix the work behind the work, helping CUs streamline document-heavy processes and free their teams to serve members.                 |
| 52 | <b>DEI Incorporated:</b> We are a forward-thinking national design/build company that has designed, built or remodeled over 1,800 financial facilities. We create sales environments by incorporating all aspects of facility planning & design. We design and build to grow your business.           |
| 54 | <b>Diebold Nixdorf:</b> We transform the way people bank. As a global technology/services partner to the world's top financial institutions, our integrated solutions connect digital and physical channels for consumers. Visit <a href="http://www.DieboldNixdorf.com">www.DieboldNixdorf.com</a> . |
| 13 | <b>Dolphin Debit Access:</b> We provide comprehensive ATM & ITM-as-a-Service solutions for credit unions. Our solution is complete outsourcing for your ATM & ITM program. We eliminate capital expense & compliance, reduce your operational costs & vendor due diligence.                           |
| 74 | <b>dormakaba:</b> We deliver trusted safe lock solutions—electronic, mechanical, and IP-connected—to help banks secure assets, reduce risk, ensure compliance, and centralize access across branches and ATMs.                                                                                        |
| 9  | <b>Earnest Consulting Group:</b> We work with credit union boards and senior management to: build strategies to reward and retain key executives through Executive Benefits, provide investment solutions to offset employee benefit costs, and enhance the credit union's charitable giving.         |
| 30 | <b>Elan Credit Card:</b> Our turnkey credit card program delivers a solution that removes costs, reduces risks, and improves the cardmember experience. We know it's about more than a card — it's about developing loyalty and value for your cardmembers.                                           |
| 40 | <b>Eltropy*:</b> We empower 700+ Credit Unions and Community Banks with cutting-edge solutions that ensure their communities have access to the best financial products anytime, anywhere.                                                                                                            |
| 39 | <b>Envisant:</b> Our product strategy features credit and debit programs, prepaid Visa reloadable and gift card programs.                                                                                                                                                                             |

19

**Federal Home Loan Bank of Indianapolis:** We serve Indiana credit unions by providing liquidity solutions (through Advances and the Advantage Mortgage Purchase Program) and grants to support affordable housing.

71

**Federal Reserve Financial Services:** We facilitate more than \$5 trillion worth of payments each day across all our services — including the Fedwire® Funds Service, FedACH® Services, Check Services, and our newest payments platform, the FedNow® Service.

3

**Financial Systems Corp:** We deliver ATMs, cash recyclers, safes, vaults, drive-up systems, and security equipment, backed by expert installation, service, and support to keep credit unions running efficiently and securely.

79

**FIS Global:** We provide payments solutions for credit unions: cards, loyalty engagement, payments network, and fraud management solutions.

10

**FLEX:** We are an innovative core solution for credit unions and ranks #2 in market share for credit unions between \$50 - \$250 million in assets. FLEX now serves over 285 credit unions in locations across the United States.

43

**Forvis Mazars:** We provide integrated audit, tax, and advisory solutions tailored to credit unions—enhancing financial reporting, managing risk, ensuring compliance, and driving strategic growth through industry-focused insights and data-driven guidance.

35

**Frost:** We specialize in the auto lending space in credits and offer GAP, VSC, Depreciation protection as well as other solutions.

67

**Gallagher:** Our team help credit unions secure their future through leadership continuity. We specialize in non-qualified benefit plans to recruit, retain, and reward.

7

**Holman:** We transform the remarketing of repossessed vehicles and powersports assets by eliminating inefficiencies and focusing on what drives results: speed, simplicity, and value.

77

**HUB | Taylor Advisors:** We are a balance sheet management consulting firm and an SEC-registered investment advisor servicing financial institutions. We are not a brokerage firm but a team of investment analysts and balance sheet consultants.

51

**iDiz Incorporated:** We specialize in world-class websites, authentic brands and marketing results for credit unions and CUSOs. We're passionate about the credit union movement's power to make the world a better place. Ask about a "Monster Express" website!

80

**Indiana Credit Union Foundation**

73

**Indiana Credit Union League**

\*Denotes endorsed business partners of the League/Servicecorp.

|       |                                                                                                                                                                                                                                                                                              |
|-------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 80    | <b>Indiana Credit Union Political Action Committee (ICUPAC)</b>                                                                                                                                                                                                                              |
| 75    | <b>JUDI.AI:</b> Born inside a fintech lender, we help 50+ credit unions deliver fast, AI-powered small business lending. Our cash flow-based underwriting combines consumer lending speed with commercial lending rigor to reduce friction.                                                  |
| 57    | <b>K4 Architecture + Design:</b> We are an integrated team of Architecture, Interior & Graphic Design, Construction, Marketing and Administrative professionals that brand, design/build, and remodel commercial buildings with a particular focus in the financial sector.                  |
| 15    | <b>La Macchia Group:</b> We are a design/build firm specializing in strategy, branding, real estate, and technology for financial institutions. Since 2002, we have completed 1,000+ projects nationwide, delivering strong ROI and member experiences.                                      |
| 31    | <b>LifeNotes   infineo:</b> We reimagine executive benefits with LifeNotes: higher yields, fixed durations & diversified risk. Executive benefits that strengthen your balance sheet, retain your leadership, and support succession planning.                                               |
| 61    | <b>LoanStreet:</b> We are the first fully-integrated, online platform that provides efficient, transparent and robust tools for lenders of all sizes to manage and scale loans on their balance sheets, connect with partners and effectively share risk.                                    |
| 76    | <b>Lucidia IT:</b> We deliver IT and security expertise—optimize IT spend, unify communications, secure cloud and physical spaces, and streamline support. Indiana-based with global reach, serving all your technology and security needs.                                                  |
| 11    | <b>McQueen Financial Advisors:</b> We offer investment management, Asset Liability Management and CECL, and mergers and valuations.                                                                                                                                                          |
| 65    | <b>Member Access Processing (MAP):</b> We provide credit unions with an advocate of their own when it comes to payment processing. As a CUSO, our sole focus is helping credit unions serve their members and grow their card portfolios.                                                    |
| 22-23 | <b>Member First Mortgage:</b> We are a credit union-owned mortgage CUSO. We offer a variety of unique partnership options, customizable servicing solutions, a complete suite of mortgage products, and more! <a href="http://www.discovermfm.com">www.discovermfm.com</a> - NMLS ID# 149532 |
| 66    | <b>Mission Asset Protection:</b> We deliver customizable warranty solutions and lending focused training that increase loan volume, strengthen member protection, and provide profit sharing opportunities through a flexible, innovative CU owned CUSO model.                               |

|    |                                                                                                                                                                                                                                                                                     |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 29 | <b>Navatros:</b> We provide CRIF - indirect leading, CBS - commercial leading, and HR solutions (PerforcePro & Compease).                                                                                                                                                           |
| 46 | <b>Neighborhood Mortgage Solutions:</b> We are a Mortgage CUSO specializing in partnering with credit unions by offering many different types of partnerships offering long-term low-cost mortgages, which in some cases allows your credit union to retain the bulk of the income. |
| 34 | <b>Origence:</b> Founded in 1994 as a CUSO, we have helped credit unions originate nearly \$600B in loans, transforming the lending experience for credit unions and their members through a network of connected technology solutions.                                             |
| 70 | <b>PAI - Powered by Brink's:</b> Our full suite of services combines extensive ATM industry knowledge with the reliability of Brink's secure logistics, creating solutions that drive efficiency, boost profitability, and elevate the customer experience.                         |
| 50 | <b>QSI Inc. - Bardstown, KY:</b> We are NCR's largest financial partner. We offer turnkey ATM and ITM solutions, including outsourcing and in-house financing. Other solutions include TCRs, video, alarm, security and branch equipment.                                           |
| 8  | <b>Riley Children's Foundation*:</b> We are part of Children's Miracle Network and are proud to partner with Indiana Credit Unions and the League to make a difference statewide.                                                                                                   |
| 2  | <b>Robert Steele Agency, Inc.:</b> We provide debt and lending related services and insurance to credit unions. We help lenders reduce risk across their lending portfolios, comply with lending regulations, increase process efficiencies, and minimize necessary costs.          |
| 56 | <b>Route 66 Extended Warranty:</b> With 40 years of experience, we offer the best value in the credit union industry. With a local representative and a plan for every vehicle, let us help you increase your fee income and protect both your investments and members!             |
| 73 | <b>Servicecorp:</b> We provide employee group benefits, share draft solutions, marketing services, overdraft privilege programs, auto valuation program, and managed IT services.                                                                                                   |
| 16 | <b>Servion Mortgage:</b> We provide community financial institutions the tools and support needed to build a mortgage lending program from the ground up or enhance an existing one. We'll tailor our solutions to meet your FI's specific needs.                                   |
| 25 | <b>Sharetec:</b> We are a leading provider of forward-thinking and best-in-class core processing and digital banking solutions to reinvigorate credit union operations and enhance member experience.                                                                               |

\*Denotes endorsed business partners of the League/Servicecorp.

|    |                                                                                                                                                                                                                                                           |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 78 | <b>Shiftmate Corp:</b> We help financial institutions connect data, surface insights, and launch secure, governed AI workflows that improve decisions, outreach, member engagement, growth, and operational efficiency.                                   |
| 33 | <b>Spayside Consulting LLC:</b> A strategic partner for credit unions, we turn complex change into momentum—guiding software conversions, mergers, digital strategy, and growth with hands-on leadership, stakeholder alignment, and ROI-focused results. |
| 48 | <b>SRM:</b> We are a global advisory and execution firm helping financial institutions and fintechs modernize with confidence by combining strategy, technology, and execution.                                                                           |
| 28 | <b>Starfish Computer Corporation:</b> We are an Information Technology Managed Services company serving the IT and Cybersecurity needs of area companies, non-profit organizations, credit unions, trade and business associations.                       |
| 6  | <b>State National Companies:</b> We offer portfolio protection and risk management. (CPI/MPI/MAP)                                                                                                                                                         |
| 17 | <b>StoneCastle*:</b> We are a part of Fiserv and provide deposit funding (LID credit unions) and extended federal insurance up to \$100 million to all credit unions. Our solutions help credit unions retain their members and attract new ones.         |
| 27 | <b>SWBC:</b> We are a diversified financial services company providing a range of insurance, mortgage, and investment services to financial institutions, businesses, and individuals across all 50 states.                                               |
| 55 | <b>Sync1 Systems:</b> We are a loan origination software Credit Union Service Organization focused on lending and the digital experience.                                                                                                                 |
| 32 | <b>The Baker Group:</b> We are one of the nation's largest independently owned securities firms specializing in asset/liability and investment portfolio management for community financial institutions.                                                 |
| 20 | <b>The Credit Union Investment Strategy Group:</b> We specialize in providing fixed income investment strategies tailored to the individual needs of small and large credit unions.                                                                       |
| 4  | <b>The Redmond Company:</b> We are a trusted design/build partner to financial institutions nationwide. Guided by integrity, collaboration, and data-driven insight, Redmond blends advanced analytics with architecture and construction expertise.      |

|          |                                                                                                                                                                                                                                                                    |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 26       | <b>The Sheeter Group:</b> We consult on executive benefits and compensation, including nonqualified benefits and insurance strategies for retention and succession planning. We conduct compensation studies. We are the CUES partner for compensation consulting. |
| 47       | <b>Titan Armored:</b> We provide cash and financial services.                                                                                                                                                                                                      |
| 64       | <b>TransFund:</b> We have been making money move since 1975. We provide debit and credit card processing, fraud protection, ATM solutions, and customized marketing to credit unions while delivering great service and innovative solutions to help them compete. |
| 63       | <b>Trellance*:</b> We are a credit union cooperative and leading technology partner for credit unions. Our entities – consisting of Rise Analytics, ProBridge and Optiri – provide innovative technology solutions for credit unions.                              |
| 14       | <b>TriAD CTV:</b> We are the leading streaming TV ad-targeting platform and the exclusive provider of Credit Union CTV™. Reach your target audience across every streaming TV channel & app, on every Connected TV (CTV) device. All in one place!                 |
| 53       | <b>TruStage*:</b> We are a strong insurance and financial services provider, built on the philosophy of people helping people. We believe a brighter financial future should be accessible to everyone.                                                            |
| 1        | <b>Velera*:</b> We provide ATMs, cards, BNPL, digital enablement and shared branching.                                                                                                                                                                             |
| 18       | <b>Vericast*:</b> We are highlighting data-driven marketing and financial technologies designed to enhance credit union growth. Their solutions focus on deposit acquisition, loan growth via Shopper Alert, and card services.                                    |
| No Booth | <b>Visa*:</b> We are a trusted network and world leader in digital payments, working to remove barriers and connect more people to the global economy. Our purpose is to uplift everyone, everywhere by being the best way to pay and be paid.                     |
| 58       | <b>Weltman, Weinberg &amp; Reis Co, LPA:</b> We partner with credit unions of all sizes to evaluate and find effective solutions for their business and legal needs, from charged-off delinquent accounts to complex legal matters and general counsel services.   |
| 49       | <b>ZOLL Medical Corporation:</b> We provide AEDs, interactive trauma kits and program management for schools, fitness centers, corporations, law enforcement, and other organizations that accommodate or serve the public.                                        |

# WI-FI/EVENT APP INFORMATION

## For Wi-Fi Internet access in Convention meeting rooms:

Connect manually to wireless network titled "JWMarriott\_CONFERENCE." JW Marriott Indianapolis page will appear.

Click on "Connect." Click button for "I have a passcode." Enter passcode "ICUL2026" and your name. Accept Terms of Service.

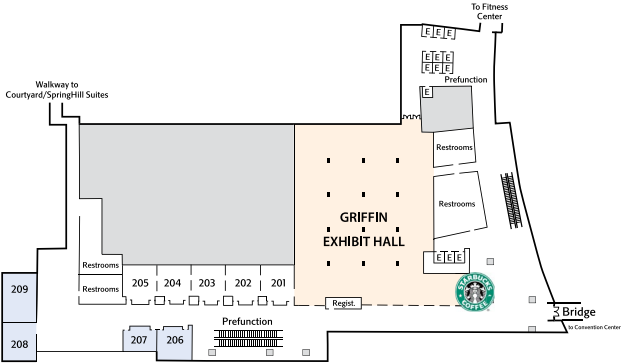
Access in other areas of the hotel is handled differently.

Wi-Fi access is sponsored by: **velera**

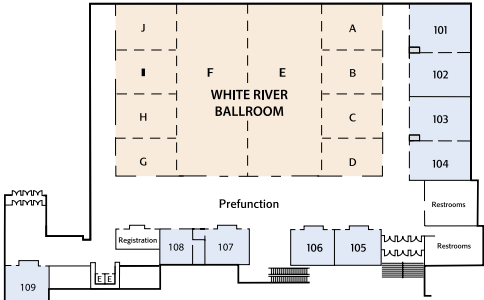


For instant access to all the Convention information you want or need, we recommend downloading the League Convention 2026 app. Scan the QR code above to download the event app, enter the event ID **PCgMi CONV2026** to find the League Convention, and log in to see all up-to-the-minute event details. (Note: There is a space before CONV2026.)

# JW MARRIOTT INDIANAPOLIS FLOOR PLANS



Second Floor



First Floor  
(White River Conference Level)



## Indiana Credit Union League

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