

Agenda

Supervisory Committee Conference

DAY 1 Monday, June 4			
7:30 a.m.–8:30 a.m.	Registration and continental breakfast		
8:30 a.m.–8:45 a.m.	Welcome and opening remarks		
8:45 a.m.–9:40 a.m.	<p>An Economic Update We'll cover the United States economy, including an overview of where we are today, headwinds to watch out for, and prospects down the road. <i>John W. Mitchell, M&H Economic Consultants</i></p>		
9:40 a.m.–9:50 a.m.	Break		
9:50 a.m.–10:50 a.m.	<p>Effective Governance As responsibilities and expectations change to match an increasingly complex environment, we'll review corporate governance policies that help ensure the financial viability of your credit union. <i>Aran Loftus, Senior Manager, Moss Adams</i></p>		
10:50 a.m.–11:00 a.m.	Break		
11:00 a.m.–12:00 p.m.	<table border="0"> <tr> <td style="vertical-align: top;"> <p>Working on Work Plans We'll discuss supervisory committee work plans as well as internal audit plans and share best practices for drafting a comprehensive plan. <i>Katherine Hart, Senior Manager, Moss Adams</i></p> </td> <td style="vertical-align: top;"> <p>Understanding the Books Gain an understanding of the key concepts surrounding credit union financial statements and drivers to help you better understand and evaluate performance. <i>Ryan Sturgis, Partner, Moss Adams</i></p> </td> </tr> </table>	<p>Working on Work Plans We'll discuss supervisory committee work plans as well as internal audit plans and share best practices for drafting a comprehensive plan. <i>Katherine Hart, Senior Manager, Moss Adams</i></p>	<p>Understanding the Books Gain an understanding of the key concepts surrounding credit union financial statements and drivers to help you better understand and evaluate performance. <i>Ryan Sturgis, Partner, Moss Adams</i></p>
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12:00 p.m.–1:00 p.m.	Lunch		
1:00 p.m.–1:50 p.m.	<p>An NCUA Regulatory Perspective – Part 1 Gain an understanding of current NCUA examination issues and topics directly from an NCUA examiner and trainer. <i>Greg Marshall, National Training Specialist, NCUA</i></p>		
1:50 p.m.–2:00 p.m.	Break		
2:00 p.m.– 2:50 p.m.	<p>An NCUA Regulatory Perspective – Part 2 <i>Greg Marshall, National Training Specialist, NCUA</i></p>		
2:50 p.m.–3:00 p.m.	Break		

DAY 1 Monday, June 4 (continued)		
3:00 p.m.– 3:50 p.m.	Top 10 Audit Findings We'll explore common audit issues and steps supervisory committee members can take to help avoid them. <i>Travis Smith, Partner, and Jennifer Blake, Senior Manager, Moss Adams</i>	Trends in Regulatory Compliance Get an update on what your committee needs to know regarding the regulatory environment, including new regulations and regulatory proposals. <i>Hoi Luk, Senior Manager, Moss Adams</i>
3:50 p.m.–4:00 p.m.	Break	
4:00 p.m.–5:00 p.m.	Panel Discussion A select group of credit union professionals will discuss issues affecting the industry. <i>Moderated by Jeff Green, Partner and Financial Institutions National Practice Leader, Moss Adams</i>	
5:00 p.m.–6:30 p.m.	Cocktail Reception	

DAY 2 Tuesday, June 5		
7:30 a.m.–8:30 a.m.	Breakfast	
8:30 a.m.–9:30 a.m.	State of the Credit Union Movement Get an update on credit union initiatives that could affect your institution. <i>Scott Simpson, President/CEO, Utah's Credit Unions</i>	
9:30 a.m.–9:40 a.m.	Break	
9:40 a.m.–10:50 a.m.	Accounting and Auditing Update / CECL Get up to speed on new and proposed accounting issues affecting credit unions, including the latest on the new CECL standard. <i>Anthony Porter and Corey Preugschat, Senior Managers, Moss Adams</i>	
10:50 a.m.–11:00 a.m.	Break	
11:00 a.m.–12:00 p.m.	Cyber Security and Technology Update We will review current trends and challenges facing credit unions as they work toward managing and securing their data. <i>Craig Sanders, Partner, Moss Adams</i>	
12:00 p.m.–1:00 p.m.	Lunch	
1:00 p.m.–1:50 p.m.	Credit Union Hot topics In this session we'll review important topics facing the credit union industry and what supervisory committee members need to know. <i>Moderated by Carrie Kennedy, Dustin Birashk, Louise Hanson, Partners, and Erika Skouras, Senior Manager, Moss Adams</i>	Tax Update A review of important tax updates for credit unions. <i>Wendy Campos, Partner, and Colleen Ramires, Senior Manager, Moss Adams</i>

DAY 2 Tuesday, June 5 (continued)	
1:50 p.m.–2:00 p.m.	Break
2:00 p.m.–2:50 p.m.	<p>Fraud Detection and Prevention</p> <p>Fraud perpetrators lurk in many organizations—and credit unions are no exception. We'll discuss current fraud trends as well as best practices for prevention.</p> <p><i>Nathan LeBret, Senior Manager, and Kyle Krzyznieski, Manager, Moss Adams</i></p>
2:50 p.m.–3:00 p.m.	<p>Workshop Wrap-Up</p> <p>Final thoughts and key takeaways</p> <p><i>Dustin Birashk, Partner, Moss Adams</i></p>
3:00 p.m.	End of conference