



Velocity Solutions Executive Summit

Velocity Solutions is pleased to offer a series of Executive Summits for credit unions. Please join us for a one day workshop focused on the hottest issues that credit unions are facing today. These events feature timely topics, roundtable discussions, and plenty of opportunities to exchange ideas and network with your peers.

Dates and Locations

Each Executive Summit is planned on either a Friday or Monday to allow you to enjoy a weekend away at some of the country's finest resorts. You may participate in planned activities, such as golf or boating, or you may choose to just relax. A three night stay is included.

Select the date and location that is most convenient for you.



June 17 - 20, 2010
Hyatt Regency Lost Pines
Resort & Spa
Austin, TX



July 22 - 25, 2010
The Four Seasons Hotel
Chicago, IL



June 26 - 29, 2010
The Ritz-Carlton, Boston
Common
Boston, MA



July 29 - August 1, 2010
The Ritz-Carlton, Half Moon Bay
San Francisco, CA

RSVP Required

Space is Limited to 20 Participants
Amy Koresko (910) 254-9383 Ext. 152
amy@myvelocity.com

Schedule at a Glance

8:30 AM – 9:00 AM	Breakfast
9:00 AM – 9:30 AM	Presentation: Redefining Checking Products & Services in the New Environment
9:30 AM – 10:00 AM	Roundtable Discussion
10:00 AM – 10:15 AM	Break
10:15 AM – 10:45 AM	Presentation: The Impact of Reg. E on NSF Best Practices
10:45 AM – 11:45 AM	Roundtable Discussion
11:45 AM – 12:45 PM	Lunch
12:45 PM – 1:15 PM	Presentation: Checking Account Strategies for Immediate Payback
1:15 PM – 1:45 PM	Roundtable Discussion
1:45 PM – 2:00 PM	Break
2:00 PM – 2:30 PM	Presentation: Why Referral Strategies Win Profitable Accounts
2:30 PM – 3:00 PM	Roundtable Discussion

Session Descriptions

Redefining Checking Products & Services in the New Environment

More changes have occurred with checking accounts in the last year than in the previous twenty. All components of the checking account marketing mix, from pricing and product definition to promotion and distribution channels, are in play among financial institutions.

One of the biggest challenges is determining how to maintain non-interest revenue despite recent regulatory changes. What will the future of checking accounts hold? How can I mitigate the impact changes to Reg. E could have on my non-interest income?

In this session, we'll review the changing structure of the checking account marketplace, evolving consumer needs, competitive analysis, and emerging technologies. We'll also discuss key strategic choices you can make to maximize checking revenues and relationships in the new environment.

The Impact of Reg. E on NSF Best Practices

Recent regulatory changes present an excellent opportunity for savvy financial executives. When it comes to the management of overdraft services, striking the optimal balance between managing risks, providing the best services for your members, and improving revenue streams is a delicate task. Tack on concerns about new regulatory requirements and the risk of revenue loss, and some credit union executives find themselves in a panic.

In this session, we'll discuss the importance of understanding account holders' deposit trends and their unique risk exposure when paying into overdraft, and we'll illustrate steps you can take to best serve your members in the new environment.

Checking Account Strategies for Immediate Payback

If you're like most financial executives, you may not realize which segment of your account holders drives the bulk of your non-interest income. And, you may not be aware of the benefits you can see from partnering with merchants.

Using actual data from financial institutions, this session will explore different ways to grow the most profitable segment of your member base and tap into outside sources of additional income. We'll discuss specific strategies that can be implemented immediately for rapid results and offer actionable items for you to take back to your credit union.

Why Referral Strategies Win Profitable Accounts

Profitable account acquisition is the financial industry's newest challenge. Direct mail is no longer effective. "Free checking" has lost its luster. And, the economic crisis has made consumers leery of any offers that seem too good to be true. So, how are some credit unions still opening plenty of accounts while others are struggling?

This session provides case studies illustrating how to implement a successful account acquisition strategy with a sustainable competitive advantage for your organization. Come see exactly how top performing financial institutions are getting measurable results from a referral strategy with performance tracking of accounts.

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