

# “Let’s Build Something Together”

2011

## CUsource Family Reunion & User Conference September 13-15 Great Falls Hilton Garden Inn

Bring the Family! It's only \$300 per credit union (as many staff as you want or need).

Credit Unions may use this flyer's back page to register or you can log on to our website at [www.cusource.com](http://www.cusource.com) and register there. After registering you will receive a confirmation email. Credit unions will be billed on their September CUsource invoice.

Topics include: Real Estate, Ultra Data Tips and Tricks, Internet Banking, Platforms, Marketing, Network Security, Efficiency Base Practices and More

Building Partners:



Anyone is welcome to sit in any of the presentations, we have provided the following symbols to identify which staff may be most interested in attending: ● CEO's / Sr. Mgt. ● Operations ● Marketing ● IT / Tech ● Real Estate



**Monday Night** Registration & Reception (Hilton Garden Inn) 4:30 –6:30 p.m.

*Come join CUsource staff in a relaxed social atmosphere & enjoy a cocktail with great company.*



**Tuesday, September 13, 2011**

**7:30 Registration & Breakfast**

**8:15 Is Your House State of the Art & Energy Efficient?**

*Hear about where credit unions are going and what is available. Join Jodi Torres and Girish Shah with CUTech as they explore new technologies, adaption rates, vetted vendors and industry trends ●●●●●*

**11:30 Networking Lunch (provided) ●●●●●**

**12:45—2:15 Building Solid Foundations –**

*Thought Leadership on Regulations, Portfolio Management, Due Diligence and the Durbin Amendment (Fiserv) ●●●●●*

**2:15—2:45 Networking Break**

**2:45—4:15 General Contracting Options—**

*Blue Point Solutions will present their promise of service delivery and future strategic plans. ●●●●●*



**Dinner is on your own!**



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Wednesday, September 14, 2011

7:30 Registration & Breakfast

8:15 Check Out Our Blue Prints

Learn where CUsource is going with their Strategic Plan and hear about new technologies and upgrades in each of our departments. ●●●●●



**Breakouts**

10:45—12:15 Streamlining Efficiencies on the Core:

Tips & Tricks (on the Ultra Data software) with CUsource Software Services' Terri Austin ●●●

Technology Navigator

Learn about the software that delivers focused information on Lending, Deposits and Operations from the host system. Quick results, easy access! ●●●●

12:15—1:30 Networking Lunch Provided ●●●●●

**Breakouts**

1:30—3:00 OCS and Chargeback Tracking (two card solutions / one workshop)

Learn more about this solution with Software Services' Leona Reese ●●●

The House that CUBUS Built

Come see about the products and solutions available including eVault, Skip A Pay, Internet Banking and more. ●●●

**Breakouts**

3:15—4:45 Risk Based & Adjustable Rate Lending

The presentation will cover the core system options to set and manage Risk Based & Adjustable Rate Lending with Software Services' Heather Doland ●●●



Accessorize Your Marketing on a Budget.

Find out more about e-statements, text, voice and email options for marketing directly to your members with Digital Mailer. ●●●

6:30 Family Reunion Dinner & Entertainment ●●●●●

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Thursday, September 15<sup>th</sup>, 2011

7:30 Registration & Breakfast

8:30—10:30

**Architectural Designs for New & Existing Credit Unions**

ORCC will showcase their internet banking platform and ancillary products and highlight their upcoming plans. ●●●●●



**Breakouts**

10:45—11:45

**Householding, Profit Vue and more with Curtis 1000 Market Wise Department**

Senior management will want to take a look at these solutions that pull data from the General Ledger to calculate account-level profitability. It has always been possible to import results of a cost accounting system into an MCIF. Larger institutions can afford to have both systems, but only about 1 in 10 MCIF systems have any reliable profit data in them. CFO's want to know if ProfitVue ties back to their financials – it does. Marketers want to know what products can be profitably sold to whom, and how to measure the results. ProfitVue does this to.



**Building a Solid Foundation with OnBase**

A 'must attend' for operational staff wanting to minimize paper and increase archival efficiency. Check out Signature Capture and more. ●●●●

11:45—12:45

Networking Lunch Provided ●●●●●

**Breakouts**

1:00—2:30

**Choosing the Right Tool for the Job: Recalls vs. Tech Nav ●●●**

Save time and resources when running reports and building customized recalls by knowing which ones already are built into your Tech Nav software.



**Building Houses / Building Relationships** Learn more about the various real estate loan packages available from CUsource ●●



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