

# VENTURETECH 2023

## AGENDA

Omni Frisco, Frisco, Texas | November 6th-8th

### Day 1:

### Monday, November 6<sup>th</sup>

7:00 - 12:00 pm

**Exhibitor Check-in and Set-Up**

**The Star Ballroom Foyer**

9:00 - 11:30 am

**Fintech Boot Camp**

**Wynne Ballroom B & C**

**SPONSOR: 10Pearls**

9:00 am

**Welcome | Intro**

Jenny Jackson, CUNA Strategic Services

9:15 am

**Panel Discussion: If You Build it, Will they Come?**

Facilitator: Barb Lowman, President, CUNA Strategic Services

Panelists: **CU Panelist:** Kent Lugrand, President/CEO of InTouch Credit Union

**Fintech Panelist:** Dave Lewis, Founder/CEO of Ranqx

**League Panelist:** Melissa Pomeroy, Chief Revenue Officer, Cooperative Credit Union Association

10:00 am

Refreshment Break

**Wynne Foyer**

**SPONSOR: FiVerity**

10:15 am

**From Mentored to Mentor – Lessons from a VentureTech**

**Wynne Ballroom B & C**

**Success Story**

Fireside chat between Ashish Garg, Founder & CEO of Eltropy and Jenny Jackson, VentureTech Co-founder and Alliance Manager of CUNA Strategic Services

10:45 am

**Roundtable Breakouts**

**Wynne Ballroom B & C**

Facilitated tables: Fintech, Distribution Channel or CU Executive

Topics will be around distribution, messaging and how Credit Unions and Fintechs can leverage each other to benefit the industry

11:15 am

**Wrap Up/Take Aways**

11:45 – 1:15 pm

**Curql's Credit Union Roundtable Lunch**

**Wynne Ballroom A**

An opportunity for Curql Credit Union CIOs, CTOs, Sr. VPs, and VPs of Technology to network with peers and discuss technology challenges and opportunities

# VENTURETECH 2023

11:45 – 1:15 pm	<b>CurqI Fund II Investor Lunch Meeting</b> An information meeting for Credit Unions only about investing in CurqI Fund II	<b>Wynne Ballroom B &amp; C</b>
12:00 - 1:30 pm	<b>Registration   Check-in</b> <b>SPONSOR: Goalsetter</b>	<b>The Star Ballroom Foyer</b>
12:00 - 1:30 pm	<b>Intersection Hall Open</b> <b>Specialty Coffee Station   SPONSOR: Quilo</b>	<b>The Star Ballroom C &amp; D</b>
1:30 - 4:45 pm	<b>Welcome   Launch Party Pitches</b> <b>Launch Party MC SPONSOR: Eltropy</b>	<b>The Star Ballroom A &amp; B</b>
1:30 – 2:00 pm	<b>Welcome</b> Nick Evens, President & CEO, CurqI Collective Jenny Jackson, Alliance Manager, CUNA Strategic Services	
2:00 – 3:00 pm	<b>Launch Party Pitches 1 – 5</b> <i>SpentDebt, Starlight, Penny Finance, Privacy Lock, Reset</i>	
3:00 - 3:30 pm	<b>Launch Party Refreshment Break: Intersection Hall</b> <b>Launch Party   Specialty Cocktail SPONSOR: Swivel</b> <b>Specialty Coffee Station   SPONSOR: Quilo</b>	<b>The Star Ballroom C &amp; D</b>
3:30 – 4:30 pm	<b>Launch Party Pitches 6 – 10</b> <i>Frich, Casap, Peacefully, Manifest, Revival Homes</i>	
4:30 – 4:45 pm	<b>Vote for Best Launch Party Pitch &amp; Award Presentation</b>	
4:45 - 6:00 pm	<b>Get to know our Sponsors &amp; Fintechs: Intersection Hall Reception</b> <b>SPONSORS: Nymbus, CurqI and Messick Lauer Smith PC</b>	<b>The Star Ballroom C &amp; D</b>
6:00 – 8:00 pm	<b>(Credit Union) Invite Only Event   Silvur's Pickle Baller Invitational (@ The Star)</b> <b>Private Event SPONSOR: Silvur</b>	

# VENTURETECH 2023

## Day 2:

**Tuesday, November 7<sup>th</sup>**

7:30 - 6:00 pm

**Registration | Check-in | Hospitality Desk**

**The Star Ballroom Foyer**

**SPONSOR: [Goalsetter](#)**

7:30 - 8:30 am

**Breakfast**

**Wynne Ballroom**

**SPONSORS: [Credit Mountain](#) and [Datava](#)**

8:30 - 12:15 pm

**Credit Union Session**

**The Star Ballroom A & B**

**SPONSOR: [Reseda Group](#)**

8:30 am

**NCUA Director Presentation**

Charles Vice, NCUA Director, Financial Technology & Access

9:00 am

**Investing from the Credit Union and CUSO C-Suite**

Brenda Worrell, CEO, Idaho Central Credit Union

Darlene Johnson, CGO, Suncoast Credit Union

Nancy Sternitzky, CIO, Sound Credit Union

Facilitator: Barb Lowman, CUNA Strategic Services

9:35 am

**What we Saw from Launch Party – [Audience participation](#)**

10:00 am

**Refreshment Break: Intersection Hall**

**The Star Ballroom C & D**

**SPONSORS: [PatientFi](#) and [Scienaptic](#)**

**Specialty Coffee Station | SPONSOR: [Quilo](#)**

10:20 am

**What's Coming at Us from the VC's Perspective**

Carey Ransom, BankTech Ventures

John Clausen, Mendon Ventures

Facilitator: Nick Evens, Curql Collective, LLC

11:00 am

**Dynamics of an Exit: Buy Side and Sell Side Perspective**

Seth Brickman, QCash Financial

Tony Boutelle, Origence

Facilitator: Nick Evens, Curql Collective, LLC

11:30 am

**Understand Your Influence: What it Means When You Agree to Invest In a Fintech/CUSO**

Elizabeth Caven, Next Level Ventures

Sam Das, Managing Director, TruStage Ventures

Facilitator: Nick Evens, Curql Collective, LLC

# VENTURETECH 2023

12:15 - 1:30 pm	<b>Lunch</b> <b>SPONSORS: Janusea and Paperwork</b>	<b>Wynne Ballroom</b>
1:30 - 4:30 pm	<b>Fintech Welcome   Overview   Fintech Pitches</b> Tanya Van Court, Founder & CEO, Goalsetter - MC	<b>The Star Ballroom A &amp; B</b>
1:30 – 1:40 pm	<b>Fintech Welcome   Overview</b>	
1:40 – 2:45 pm	<b>Fintech Pitches 1 - 4</b> <i>Members Mobile, CryptoFi, Karma Wallet, Newzip</i>	
2:45 - 3:15 pm	<b>Refreshment Break: Intersection Hall</b> <b>SPONSORS: AKUVO and Illuma</b> <b>Specialty Coffee Station   SPONSOR: Quilo</b> <b>Smoothie Station   SPONSOR: Creatio</b>	<b>The Star Ballroom C &amp; D</b>
3:15 - 4:20 pm	<b>Fintech Pitches 5 – 8</b> <i>Method, Sparrow, Legal Karma, Chimney</i>	<b>The Star Ballroom A &amp; B</b>
4:20 – 4:30 pm	<b>Day 1 Vote for Best Fintech Pitch</b>	
4:30 - 6:00 pm	<b>Get to know our Sponsors &amp; Fintechs: Intersection Hall Reception</b> <b>SPONSORS: TAPP Engine and Wysh</b>	<b>The Star Ballroom C &amp; D</b>
5:00 pm	<b>The Star Tours</b> <b>SPONSORS: Effectiv and Nickels</b>	
6:00 – 8:00 pm	<b>(Credit Union) Invite Only Event   Happy Hour, Appetizers and Giveaways</b> At the Concrete Cowboy <b>Private Event SPONSOR: DefenseStorm</b>	

# VENTURETECH 2023

## Day 3: Wednesday, November 8<sup>th</sup>

7:30 - 8:30 am	<b>Breakfast</b> <b>SPONSORS: Spiral and Woodridge Software</b>	<b>Wynne Ballroom</b>
8:30 - 11:30 am	<b>Welcome Back   Quick Overview   Fintech Pitches</b> Tanya Van Court, Founder & CEO, Goalsetter - MC	<b>The Star Ballroom A &amp; B</b>
8:40 – 9:45 am	<b>Fintech Pitches 9 - 12</b> Debbie, SAVE, Vertice AI, Bits of Stock	
9:45 - 10:15 am	<b>Refreshment Break: Intersection Hall</b> <b>SPONSORS: Arkatechture &amp; Strum Platform</b> <b>Specialty Coffee Station   SPONSOR: Quilo</b>	<b>The Star Ballroom C &amp; D</b>
10:15 - 11:20 am	<b>Fintech Pitches 13 – 16</b> upSWOT, VeraScore, Spiral, Eko	<b>The Star Ballroom A &amp; B</b>
11:20 – 11:30 am	<b>Day 2 Vote for Best Fintech Pitch</b> <b>Day 1 &amp; Day 2 Winner Pitch Off</b> <b>Final Vote for Winner of Best Fintech Pitch</b> <b>Award Presentation</b> <b>Best In Show Fintech Pitch SPONSOR: NACUSO</b>	
11:30 am	<b>Closing</b>	
11:30 - 12:30 pm	<b>Exhibitor Tear Down</b>	<b>The Star Ballroom C &amp; D</b>

Save the Date for **VentureTech 2024!**  
**Tuesday Nov. 12<sup>th</sup> – Thursday Nov. 14<sup>th</sup>**