

# VENTURETECH

## 2024 AGENDA

### DAY 1: TUESDAY, November 12, 2024

7:00 am – 11:30 am	Exhibitor Check-in and Set-up	Star Foyer
8:30 am – 5:45 pm	Event Check-in & Registration   Hospitality Desk Registration   <b>Sponsored by: Mambu and Saris AI</b>	Star Foyer
9:00 am – 11:30 am	<b>The Collaboration Conversation</b> A Deeper Dive into Fintech/Credit Union Engagement Session   <b>Sponsored by: Investifi</b> <b>The Board Conversation</b> – Discussion around presenting to and gaining board buy in to either utilize/partner with a new fintech and/or investing in a fintech directly or through a fund. Moderated by: Barb Lowman, President, CUNA Strategic Services Panelists: Hina Khalid, CFO, Labor FCU Vipul Bhagat, Board Director, BankFund CU Bill Bywater, COO, NYCUA Milind Borkar, Founder, Illuma <b>The Anatomy of a Pilot</b> Moderated by: Barb Lowman, President, CUNA Strategic Services Panelists: Rachel Lauren Zikvashvili, Co-founder, Debbie Blake Woods, VP Insights, Innovation & Impact, CFCU Dave Lewis, Founder, Ranqx Scott Daukas, Principal, One Washington Financial (CUSO or WSECU)	Wynne A-B



**Point/Counterpoint: An Interactive Discussion on the Myths Behind Credit Unions and Fintech**

Moderated by: Barb Lowman, President, CUNA Strategic Services  
 Jenny Jackson, Alliance Manager, CUNA Strategic Services

10:00 am – 10:30 am	Refreshment Break <b>Sponsored by: Sync1 Systems</b>	Wynne Foyer
11:30 am – 1:00 pm	Exhibits Open in Intersection Hall Specialty Coffee Station   <b>Sponsored by: Amount</b>	Star C-D
11:30 am – 1:00 pm	Lunch <b>Sponsored by: Harness and Janusea</b>	Wynne A-B
11:45 am – 12:45 pm	<b>Curql's Credit Union Roundtable</b> Open to all credit union executives to network with peers as we discuss technology challenges and opportunities. Join us for this working lunch session.	Wynne C
1:00 pm – 1:15 pm	<b>Welcome and Introductions</b>	Star A-B
1:15 pm – 2:20 pm	<b>Launch Party Pitches #1-5</b> Event Emcee   <b>Sponsored by: Swivel</b> <b>Float   Gestalt   Parlay   Duome   GreenLyne</b>	Star A-B
2:20 pm – 2:50 pm	Launch Party Refreshment Break with Exhibits Open in Intersection Hall Refreshments   <b>Sponsored by: Bonifii and SMA Technologies</b> Specialty Cocktail   <b>Sponsored by: Finalytics</b> Specialty Coffee Station   <b>Sponsored by: Amount</b> Smoothie Station   <b>Sponsored by: Attune</b>	Star C-D   Foyer

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2:50 pm – 3:55 pm	<b>Launch Party Pitches #6-10</b> <a href="#">Restart</a>   <a href="#">Ribbon</a>   <a href="#">Wurthy</a>   <a href="#">Fundshine</a>   <a href="#">IDgo</a>	Star A-B
3:55 pm – 4:15 pm	Audience Feedback	Star A-B
4:15 pm – 4:25 pm	Update from 2023 Launch Party Winner, Peacefully	Star A-B
4:25 pm – 4:30 pm	<b>Launch Party Vote and Winner Presentation</b>	Star A-B
4:30 pm – 5:45 pm	Get to know our Sponsors & Fintechs: Intersection Hall Reception <a href="#">Sponsored by: exagens, Curql Fund and Messick Lauer Smith, P.C.</a>	Star C-D   Foyer
6:00 pm – 8:00 pm	Silvur's Pickle Baller Invitational (RSVP required) Outdoor Field, Ford Center at The Star   <a href="#">Sponsored by: Silvur</a>	

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## DAY 2: WEDNESDAY, November 13, 2024

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7:30 am – 5:45 pm	Event Check-in & Registration   Hospitality Desk Registration   <a href="#">Sponsored by: Mambu and Saris AI</a>	Star Foyer
7:30 am – 8:30 am	Breakfast <a href="#">Sponsored by: 10Pearls and Provision IAM</a>	Wynne
8:30 am – 8:35 am	<b>Welcome and Introductions</b>	Star A-B
8:35 am – 10:00 am	<b>Fintech Pitches #1-5 + Vote</b> <a href="#">Nudge Money</a>   <a href="#">Wysh</a>   <a href="#">Savvi AI</a>   <a href="#">ModernFi</a>   <a href="#">Crux Analytics</a>	Star A-B
10:00 am – 10:30 am	Refreshment Break with Exhibits Open in Intersection Hall Refreshments   <a href="#">Sponsored by: Posh and Reseda Group</a> Specialty Coffee Station   <a href="#">Sponsored by: Amount</a>	Star C-D   Foyer
10:30 am – 11:00 am	<b>Speaker: Charles Vice, NCUA Director of Financial Technology and Access</b>	Star A-B

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11:00 am – 11:45 am	<b>Panel Discussion: Value of the Relationship – Fintech and Credit Unions Growing Together</b> Session   <b>Sponsored by: Scienaptic</b> Facilitated by: Kris Kovacs, President & CEO, Constellation Digital Partners Panelists: Darlene Johnson, CGO, Suncoast Credit Union Brenda Worrell, CEO, Idaho Central Credit Union Kathy Courtney, COO, GreenState Credit Union	Star A-B
11:45 am – 1:00 pm	Lunch <b>Sponsored by: CU NextGen and Spiral</b>	Wynne
1:00 pm – 2:30 pm	<b>Fintech Pitches #6-10 + Vote</b> <b>Flourish Fi   AviaryAI   Carefull   Allure Security   Saris AI</b>	Star A-B
2:30 pm – 3:00 pm	Refreshment Break with Exhibits Open in Intersection Hall Refreshments   <b>Sponsored by: FI Navigator and Illuma</b> Specialty Cocktail   <b>Sponsored by: CU Healthcare PayCard</b> Specialty Coffee Station   <b>Sponsored by: Amount</b> Smoothie Station   <b>Sponsored by: Benny</b>	Star C-D   Foyer
3:00 pm – 3:45 pm	<b>Panel Discussion: Fintech Swimming in the VC Pool</b> Session   <b>Sponsored by: Scienaptic</b> Facilitated by: Nick Evens, President & CEO, CurqI Collective Panelists: Stephen Bohanon, Founder of Alkami Christian Grant, Sr. Vice President, K1 Investment Mgt	Star A-B
3:45 pm – 4:30 pm	<b>From NCUA Board to Fintech Board – A Chat with Rodney E. Hood</b>	Star A-B
4:30 pm – 5:45 pm	Get to know our Sponsors & Fintechs: Intersection Hall Reception <b>Sponsored by: Lodestar and Penny Finance</b>	Star C-D   Foyer
6:00 pm – 8:00 pm	Eltropy's Beer Mugs & Bear Hugs (RSVP required) Off-Property at Windmills   <b>Sponsored by: Eltropy</b>	

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## DAY 3: THURSDAY, November 14, 2024

7:00 am – 2:00 pm	Event Check-in & Registration   Hospitality Desk Registration   <b>Sponsored by: Mambu and Saris AI</b>	Star Foyer
7:00 am – 8:00 am	Breakfast <b>Sponsored by: Allure Security and Arkatechure</b>	Wynne
8:00 am – 8:30 am	<b>Join us for coffee and a chat with Kyle Hauptman, NCUA Vice Chairman</b>	Star A-B
8:30 am – 10:00 am	<b>Fintech Pitches #11-15 + Vote</b> <b>LoanSense   loanTERRA   Nickels   Ditch   Coverbase</b>	Star A-B
10:00 am – 10:15 am	Refreshment Break with Exhibits Open in Intersection Hall Refreshments   <b>Sponsored by: Chimney</b> Specialty Coffee Station   <b>Sponsored by: Amount</b>	Star C-D   Foyer
10:15 am – 10:30 am	<b>Fintech Pitch Off and Vote for Best in Show</b> Best in Show   <b>Sponsored by: NACUSO</b>	Star A-B
10:30 am	Closing	Star A-B
10:30 am – 11:30 am	Exhibitor Tear Down	
10:30 am – 2:00 pm	<b>Transformation Thursday:</b> <b>Next Gen Tech for Next Gen Growth</b> <b>Credit unions are doing it, why can't you? Leaders share best practices on reaching the next generation and how fintech partners can help fill in the gaps.</b> <i>Special facilitated session co-sponsored by Curql, CUNA Strategic Services, NACUSO, and the Underground Collision. Lunch will be provided.</i>	Wynne
10:35 – 11:05 am	Underground Panel	Wynne
11:05 – 11:30 am	<b>Gen Z Discussion (Born 1997-2012)</b> Facilitated by: Rowan Hume, Managing Director, Curql Accelerate Understand Gen Z's expectations from financial institutions,	Wynne

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focus on their digital fluency and desire for personalized, tech-savvy experiences.

11:30 – 11:55 am	<b>Millennial Discussion (Born 1981-1996)</b> Facilitated by: Ronaldo Hardy, CEO, NACUSO Explore Millennials' preferences for convenience, transparency, and the balancing life stages (e.g., homeownership, student loans, retirement savings).	Wynne
11:55 – 12:40 pm	Lunch and Curq  Accelerate Demos <b>Lunch Sponsored by: ezSolarLoan and Micronotes</b> <b>Coverbase   Gestalt   IDgo   Penny Finance   Traduality</b>	Wynne
12:40 – 1:05 pm	<b>Gen X Discussion (Born 1965-1980)</b> Facilitated by: Brandi Stankovic, Mitchell Stankovic & Associates Discuss the needs of Generation X, focusing on stability, wealth-building, and balancing financial responsibilities like retirement planning and caring for aging parents.	Wynne
1:05 – 1:30 pm	<b>Baby Boomer Discussion (Born 1946 – 1964)</b> Facilitated by: Barb Lowman, President, CUNA Strategic Services Uncover the financial needs of Baby Boomers, emphasizing retirement income, wealth preservation, and customer service preferences.	Wynne
1:30 – 2:00 pm	Look at Solutions + Wrap-up	Wynne

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