



2025 NCUMA FALL CONFERENCE VENDORS



Do you need to retain a critical executive? Is it time to reward your best leaders? Are you looking for executives who will take you to the next level? Are you approaching a leadership transition? Almost all credit union boards are faced with one of these questions, and if that describes your credit union, a Supplemental Executive Retirement Plan (SERP) might be the answer.

PARC Street Partners is an independent financial services company committed to helping credit unions and non-profits provide cost-effective benefits plans designed to attract and retain talent. PARC stands for Plan, Attract, Retain and Compensate. PARC Street Partners offers both types of SERP options available to the non-profit world, Split Dollar plans as well as 457f plans. In addition, we provide educational webinars to the credit union industry.

Our team transferred over from OM Financial Group effective October 15, 2023, and has over 100 years of combined experience working in & with the credit union industry.

When seasoned experience meets radical service, everyone benefits!

Website: www.PARCstreetpartners.com

Tammy O'Hara: Executive Benefits Consultant
Email: tohara@PARCstreetpartners.com
Phone: 321-689-5822

Jason Berman: Executive Benefits Consultant
Email: jason@PARCstreetpartners.com
Phone: 617-304-8597

NCUMA would like to thank PARC Street Partners for sponsoring NCUMA's Opening Welcome Reception.



College Ave is a private student loan provider that offers undergraduate, graduate, and parent loans, as well as refinance options. They offer multiple loan options with flexible repayment terms, including competitive interest rates, and features like instant credit decision, a simple, 3-minute application process, no application or origination fee, autopay discount, and best-in-class customer service. College Ave partners with Credit Unions through a referral program to help meet the higher education financing needs of their members. This program allows credit unions to generate referral fees while avoiding lending and loan administration.

Website: www.collegeave.com/partner

Brian Reed: Head of Partnerships
Email: breed@collegeave.com
Phone: 610-620-4322

Bill Ayers: Head of Campus Development
Email: Bayers@collegeave.com
Phone: 813-833-0599

NCUMA would like to thank College Ave for sponsoring NCUMA's Conference Breakfasts.



2025 NCUMA FALL CONFERENCE AGENDA

Saturday - August 30

Reception Location: Jacques Cartier Place D'Armes

5:00 PM - 6:00 PM Registration & Welcome Reception for Attendees and "Registered" Guests

Sponsored by [PARC Street Group](#)

(Reception Bar Type: inclusive of 2 drink tickets per registered attendee & registered guests)

Sunday - August 31

Sunday - Tuesday Breakfast Location: "Salle De Bal"

All sessions are located in: Frontenac

7:00 AM - 8:00 AM Breakfast for Attendees and "Registered" Guests - Sponsored by [College Ave](#)

8:00 AM - 9:00 AM "Governance During Crisis: Roles and Response Strategies" by David Reed

9:00 AM - 10:00 AM "The Future of Payments: Trends, Innovations and What's Next for CU's" by Becky Reed

10:45 AM - 4:00 PM Optional Networking Activity: Historical Old Quebec Tour & Lunch Cruise - \$225
Leaves promptly at 10:45am from the ground floor (SS level)

Monday - September 1

7:30 AM - 8:45 AM Breakfast for Attendees and "Registered" Guests - Sponsored by College Ave

8:45 AM - 10:15 AM "Part One: Global Economic Overview" By Frank Kelly

10:15 AM - 10:30 AM Coffee Break

10:30 AM - 12:00 PM "Part Two: Global Economic Impact" By Frank Kelly

Tuesday - September 2

7:30 AM - 8:45 AM Breakfast for Attendees and "Registered" Guests - Sponsored by College Ave

8:45 AM - 10:15 AM "The Batman Utility Belt Strategy: Three Prongs of Sustainable Growth" by Ancin R. Cooley

10:15 AM - 10:30 AM Coffee Break

10:30 AM - 12:00 PM "Beyond the Retreat: How CU's Execute Strategy" by Ancin R. Cooley

5:50 PM - 10:15 PM French Canadian Sugar Shack Experience - \$262.57
Leaves promptly at 5:50pm from the ground floor (SS level)

Wednesday - September 3

Breakfast Location: Petit Frontenac, Bellevue & Rose Rooms

7:30 AM - 8:45 AM Breakfast for Attendees and "Registered" Guests- Sponsored by College Ave

8:45 AM - 9:45 AM "Steering Through Change: CU's, Regulation, and the Future of Financial Services" by Rodney Hood

9:45 AM - 10:45 AM "Staying Ahead of the Adversary: Emerging Threats, Technologies, and Strategies to Protect Credit Unions and Their Members" by Gurvais Grigg

Times, events, and topics subject to change without notice.



2025 NCUMA FALL CONFERENCE SESSIONS

Sunday - August 31

"Governance During Crisis: Roles and Response Strategies" by David Reed

From cyber-attacks to horrible bill payment conversions, data breaches to fraud, every credit union should be prepared to launch an effective response when a negative event strikes. Is your credit union prepared? Learn how boards and senior management should act during crises—financial, operational, reputational, or natural disasters.

"The Future of Payments: Trends, Innovations and What's Next for Credit Unions" by Becky Reed

Explore the evolving landscape of payments and what it means for credit unions. From real-time payments to stablecoin and digital wallets, AI-driven fraud prevention, and emerging technologies like blockchain, this session will provide insights into the innovations shaping the future. Discover strategies to stay competitive, meet member expectations, and navigate regulatory challenges in an increasingly digital world

Monday - September 1

"Part One: Global Economic Overview" by Frank Kelly

This session provides a comprehensive global overview of the major geopolitical and economic developments over the past year. Frank Kelly will examine the impact of new tariffs, escalating trade wars, and significant regime changes that have altered the balance of global power and economic cooperation. The session explores how these changes have disrupted supply chains, shifted international trade dynamics, and influenced investor confidence and global market behavior. Attendees will gain a broader understanding of the evolving international environment and the underlying forces reshaping global business, finance, and policy. This overview lays the groundwork for understanding the practical implications explored in Part Two.

"Part Two: Global Economic Impact" by Frank Kelly

Building on the global context established in Part One, this session focuses on the real-world impact of these geopolitical and economic shifts—especially the evolving policy landscape in Washington. Frank Kelly will analyze how legislative and regulatory changes are influencing business strategy, investment planning, and market stability. From changes in fiscal and trade policy to shifts in financial regulation and enforcement, this session will detail what has already happened, what may come next, and how these developments are likely to affect you, your business and financial institutions. Attendees will leave with practical insights into managing risk, identifying opportunity, and preparing for the challenges of an increasingly uncertain economic climate.

Tuesday - September 2

"The Batman Utility Belt Strategy: Three Prongs of Sustainable Growth" by Ancin R. Cooley

What made Batman so formidable—despite having no superpowers—wasn't just his intellect. It was his readiness. No matter what challenge came his way, he always had a solution tucked into that utility belt. But more than tools, he always had a strategy—and the discipline to execute it.

Credit union leaders need the same: not just ideas, but a reliable set of strategic tools—and more importantly, a repeatable way to execute.

In this workshop-style session, Anson Cooley of Synergy Credit Union Consulting introduces your team to the Batman Utility Belt Growth Strategy—a three-pronged approach to sustainable growth:

- Organic Growth through targeted member experience, marketing, and product alignment.
- Selective Mergers are rooted in shared values and long-term strategic fit.
- Inorganic Leaps like loan participations, fintech partnerships, and specialty portfolios.



2025 NCUMA FALL CONFERENCE SESSIONS

Tuesday - September 2 Continued

["Beyond the Retreat: How Credit Unions Execute Strategy" by Ancin R. Cooley](#)

Strategic plans look great in binders, but success lives in the execution. In this follow-up to The Batman Utility Belt Strategy, we roll up our sleeves and dig into what happens after the strategy retreat ends. This hands-on session is all about operational execution: the repeatable systems, meeting rhythms, dashboards, and decision cadences that actually bring strategy to life. Ancin Cooley of Synergy Credit Union Consulting will walk through real-world examples of execution in action, where growth didn't come from a bold idea, but from doing the right things consistently across teams.

You'll explore:

- How to translate broad strategic goals into specific, team-level commitments
- The "lead measure" mindset: tracking the inputs that drive your outcomes
- How to build accountability without burnout—through cadence and compensation
- Examples of execution systems used by high-performing credit unions

Wednesday - September 3

["Steering Through Change: Credit Unions, Regulation, and the Future of Financial Services" by Rodney Hood](#)

In this forward-looking keynote session, former Acting Comptroller of the Currency and former NCUA Chairman Rodney E. Hood offers a rare, dual-agency perspective on the current and future state of financial services in the United States. With a career spanning the FDIC, Treasury coordination, and direct oversight of the banking and credit union systems, Mr. Hood brings unique insights into the intersection of capital, liquidity, digital innovation, and regulatory policy.

From Washington, D.C. policy shifts to the global evolution of stablecoins and digital assets, this conversation will explore what credit unions need to know to navigate complexity, compete with confidence, and uphold their mission in a digital-first world. The session includes opening remarks, a fireside chat with a moderator, and audience Q&A.

["Staying Ahead of the Adversary: Emerging Threats, Technologies, and Strategies to Protect Credit Unions and Their Members" by Gurvais Grigg](#)

Drawing on decades of experience in the FBI and as a former stock broker and CTO for Global Public Sector at Chainalysis, Gurvais Grigg will share critical insights into the evolving landscape of financial crime targeting credit unions and their members. This engaging session will examine how bad actors exploit traditional fraud techniques and utilize emerging technologies, from cryptocurrencies to AI-driven fraud. Attendees will learn about proven strategies for detecting and disrupting illicit activity, strengthening member trust, and safeguarding institutional resilience. By understanding the adversary's playbook and leveraging modern security and investigative techniques, credit union leaders can position their organizations to anticipate, counter, and stop threats before they cause harm.



2025 NCUMA FALL CONFERENCE SPEAKERS



David A. Reed

Partner at Reed and Jolly, PLLC

Attorney, author, consultant and nationally recognized trainer, David A. Reed is a partner in the law firm of Reed and Jolly, PLLC. Through Reed and Jolly, Mr. Reed provides guidance to credit unions concerning a variety of matters including the establishment and revision of policies and procedures, organizational compliance, collections, security, contractual agreements, regulatory matters and corporate governance. In addition to his legal expertise, Mr. Reed is a Certified Fraud Examiner and former Chairman of a Supervisory Committee. His engaging speaking style has garnered him status as a regular lecturer nationwide on topics such as regulatory compliance, governance, examination planning, consumer lending, bankruptcy and collections. He offers facilitation services and a full range of training programs that can be delivered to the Board, executive team, managers or frontline staff. A former trial attorney and Vice President and General Counsel of Apple Federal

Credit Union, Mr. Reed is particularly noted in the areas of credit union operations, governance, security, bankruptcy and collections. He has been selected to train federal and state field examination staff on numerous issues including BSA, Field of Membership, ID Theft Red Flags, S.A.F.E Act, Third Party Contract Management, Cybersecurity and Bankruptcy. He also serves as a frequent contributor to numerous industry publications. Mr. Reed received his undergraduate degree from Virginia Tech in 1986 and his Juris Doctorate from George Mason University School of Law in 1989. He resides in Fairfax, Virginia with his wife Diane and an odd assortment of cats.



Becky Reed

Founder of BRaaS Consulting

Becky Reed is a credit union industry veteran and thought leader with more than two decades of leadership in credit unions and CUSOs. Renowned for her unique perspective as both a credit union CEO and CUSO leader, her expertise and advice are sought after by those who seek to embrace innovation. Becky continues to stay at the forefront of innovation by working with emerging technologies, such as DLT and AI through her role as the Chief Operating Officer for the fintech BankSocial. Her focus revolves around the 4 'Cs' - Credit Unions, CUSOs, Crypto and Collaboration.



Frank Kelly

Founder & Managing Partner Fulcrum Macro Advisors LLC

Having worked as a senior executive on Wall Street as well as having served in senior government roles, Frank brings extensive global experience and insight into the public policy decision-making process and its impact on global markets. Frank began his career as a writer for President Ronald Reagan and went on to serve in the White House Office of Political Affairs. He served as a writer for President George H.W. Bush and then served at the Justice Department in the Office of Policy Development, focusing on national security and international issues. From there, Frank went to the US Securities and Exchange Commission, being appointed Senior Policy Advisor to the Chairman and Chief Spokesman for the Commission as well as a member of the SEC Senior Staff. He then joined Merrill Lynch Investment Banking in New York serving as Chief of Staff and Global Head of Marketing for Investment Banking, Sales & Trading. Frank was also a member of the German/Swiss/Austria

country coverage team and was involved in numerous large cross-border deals. He returned to Washington DC to establish Charles Schwab & Co.'s first Global Government & Regulatory Affairs operation. He served as both the Senior Vice President and Global Head of Government Affairs and the firm's first Chief Political Strategist. Frank joined Deutsche Bank in 2003 as the Bank's first Head of Government Affairs and then later, Global Coordinator for Government & Public Affairs. He was also the Bank's first Chief Political Strategist. In this role, he advised the Bank's top institutional clients globally on US and geopolitical issues. He also has extensive experience in mergers and acquisitions, establishing and heading up the Bank's Direct Investment Advisory Group (DIAG). Frank and his team advised corporates on sensitive national and economic security-related mergers and acquisitions seeking approvals from the US Committee for Foreign Investment in the US (CFIUS). He is a member of the board of directors of Barnwell Industries (NYSE: BRN), a diversified oil/gas drilling/land development company. Frank is also a Senior Advisor to The Scowcroft Group, a global business advisory firm with an emphasis on emerging markets. It supports clients at every business development stage, including political risk analysis, strategic planning, risk management, market development, and ongoing operations. The firm also supports clients in the investment community, providing leading-edge analysis of market impact events and trends. Frank is an adjunct professor at The Catholic University School of Business teaching coursework on Business Intelligence and Risk Assessment. He is also a Senior Associate with the Americas Program at the Center for International and Strategic Studies (CSIS) in Washington where he focuses on Latin American politics, economics, and trade. Frank serves on the Board of Directors of CODESPA America, an organization dedicated to helping those living in extreme poverty become self-reliant through access to dignified and sustainable work. He also serves as Vice-Chair of the Jerome Lejeune Foundation of America which is dedicated to advocating for people with Downs Syndrome.

Frank is a member of the Council on Foreign Relations, the International Institute for Strategic Studies, the American Council on Germany, and the American Institute for Contemporary German Studies. He resides outside Washington DC in Great Falls, Virginia with his wife, Maura, on their working farm, Open Door Farm.



2025 NCUMA FALL CONFERENCE SPEAKERS



Ancin Cooley CIA CISA

Founder and Principal, Synergy Credit Union Consulting, Inc.

Synergy helps credit unions grow and thrive by helping them manage risk, increase profits, and help members. Synergy accomplishes this through a suite of services that includes Director training, strategic planning, Enterprise Risk Management, Internal Audits, and Member Business Lending Audits. As principal, Ancin manages a growing portfolio of clients throughout the United States and the Caribbean. He brings more than 20 years of experience to the financial services industry. Ancin honed his skills while working with the US Treasury Dept. At the Treasury, he performed examinations for financial institutions ranging from \$1 million to \$11 billion in total assets, after leaving the Treasury Dept. Ancin worked for a regional accounting firm where he led internal audits and loan and pre-regulatory examination reviews. When not advising clients, training for triathlons, or spending time with his family, Ancin designs and conducts training for the Credit union industry.

In addition, he is a well-sought-after expert contributor to a host of financial publications. He has recently been featured in Forbes Magazine and the Credit Union National Association. Ancin is originally from New Orleans, LA. but, currently lives in Chicago.



Honorable Rodney E. Hood

American Government Official

Rodney E. Hood is a nationally recognized financial regulator and longtime advocate for credit unions, financial inclusion, and access to capital. Confirmed twice by the United States Senate to serve in the Administrations of President George W. Bush and President Donald J. Trump, he is the first person in U.S. history to lead both of the federal agencies responsible for chartering and supervising America's depository institutions—serving as Acting Comptroller of the Currency and as Chairman of the National Credit Union Administration. He also served on the Board of the Federal Deposit Insurance Corporation (FDIC).

Throughout his career, Mr. Hood has championed policies that promote financial empowerment, support underserved communities, and strengthen the resiliency of the credit union system. Under his leadership, NCUA advanced modernization efforts to expand digital capabilities, streamlined capital rules, and enhanced liquidity tools to help credit unions grow responsibly and serve their members more effectively.

As Acting Comptroller, he reinstated the Office of Financial Technology and Innovation, approved a bank-fintech charter to enhance small business lending, and guided national banks toward embracing cryptocurrency custody and digital assets—all with a strong commitment to robust Bank Secrecy Act (BSA), Know Your Customer (KYC), and Anti-Money Laundering (AML) compliance. He has emphasized the importance of balancing innovation with regulatory integrity, especially as stablecoins and other emerging technologies reshape financial services.

Mr. Hood's cross-agency perspective offers unparalleled insight into the evolving financial regulatory landscape—including the roles of the Treasury Department, Federal Reserve, and FDIC—and how policy developments in Washington, D.C. impact the future of the credit union system.

He is a graduate of the University of North Carolina at Chapel Hill, where he earned degrees in business, political science, and communications. He was recently honored with UNC's Outstanding Alumni Award, named a Young Global Leader by the World Economic Forum in Davos, is a Salzburg Global Fellow, and is actively engaged with the American Council on Germany.



Gurvais Grigg

Board Member/Strategic Leadership/Consulting
National Security, Law Enforcement & Compliance (FBI Agent/Executive Retired)

Gurvais Grigg is a national security and technology leader with over 30 years' experience in criminal and financial investigations, intelligence operations, and advanced technology solutions. A former FBI Special Agent and Assistant Director, he led global investigations and developed technical and forensic capabilities to detect and disrupt illicit activity. As CTO for Global Public Sector at Chainalysis, he helped governments worldwide use blockchain analytics to combat illicit finance and recover digital assets. An expert in anti-money laundering, terrorist financing, and data-driven investigations, he has modernized investigative processes, implemented AI and machine learning tools, and advises on innovation in law enforcement and intelligence.