



# 2025 NCUMA HAWAII 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 from OM Financial Group effective October 15, 2023, and has over 100 years of combined experience working in and with the credit union industry.

*When seasoned experience meets radical service, everyone benefits!*

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*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](http://www.collegeave.com/partner)

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*NCUMA would like to thank College Ave for sponsoring NCUMA's Golf Tournament.*



# 2025 NCUMA HAWAII CONFERENCE VENDORS



Elevate your digital banking experience. Account holders are looking for an intuitive and seamless experience when engaging in financial activities. Tyfone's all-in-one solution ensures you keep up with the pace of technology by delivering an ultramodern, scalable and easy to use digital banking experience that your credit union will love.

Visit [www.tyfone.com](http://www.tyfone.com) for more information.

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*NCUMA would like to thank Tyfone for sponsoring NCUMA's Opening Welcome Reception.*



## Harness the Power of Instant Payments

Payfinia's Instant Payment Xchange™ (IPX) is a secure, comprehensive, scalable, and affordable instant payments and money movement gateway to the FedNow Service. IPX securely connects to your core and enables your institution, your retail and your business account holders to securely send and receive money instantly.

### Instant Payments & Money Movement

Enable your institution and your accountholders to send and receive money in real-time for A2A, P2P, Bill Payment, B2C Disbursements, Earned Wage Access/Payroll, Loan Payments, New Account Funding and other money movement use cases.

### Advanced Security & Fraud Prevention

Fight account takeover and scam fraud with the most advanced fraud mitigation tools in the industry including dollar and velocity limits, cool off periods, dynamic grouping, trusted device initiation, and more.

### Connect to Any Core

IPX is adaptable to any core and connectivity can easily be established through a variety of connection protocols including REST/SOAP API's, FDX 5.2, or indirect connections through your digital banking and EFT connectors.

### Open API Gateway

Enable your partners' and customers' digital systems to seamlessly connect to our Instant Payment Xchange through a comprehensive suite of Open APIs.

Visit <https://tyfone.com/payfinia> to learn more.

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*NCUMA would like to thank Payfinia for sponsoring NCUMA's Opening Welcome Reception.*



# 2025 NCUMA HAWAII CONFERENCE VENDORS



Wescom Resources combines superior technology delivered by trusted people to enable credit unions to thrive and prosper.

Wescom Resources is a wholly owned credit union service organization (CUSO) of Wescom Financial, a \$6.4 billion credit union serving over 250,000 members. Supporting credit unions with a combined \$165 billion in assets and over 9 million members, Wescom Resources embodies the credit union commitment to service—acting as a natural extension of our clients' teams. Wescom Resources provides superior technology solutions that help credit unions enhance service delivery, backed by an unparalleled commitment to client service and support.

Wescom Resources' UNITRI Managed Core System hosting offers secure, private cloud core system hosting that streamlines operations, increases efficiencies, and enables credit unions to accelerate their digital transformation projects.

Wescom Resources' Tellerly® solution leverages the retail industry's leading POS terminal for providing exceptional member experiences at the teller line, with superior data privacy, transaction flow, signature capture, and marketing engagement.

To learn how your credit union can experience first-hand a one-of-a-kind CUSO partnership, visit [www.wescomresources.com](http://www.wescomresources.com).

Website: [www.wescomresources.com](http://www.wescomresources.com)

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*NCUMA would like to thank Wescom Resources for sponsoring NCUMA's CEO Roundtable.*



SRM is an independent advisory firm delivering payments, sourcing, strategy, and technology services that drive substantial business improvements for clients ranging from community financial institutions to global financial services leaders. SRM has partnered on strategic initiatives with 1,000+ clients and returned more than \$10 billion in value in the process. SRM provides trusted, data-driven, unbiased advice and continues to expand services based on client feedback and critical needs.

Through its MergerMAPSM process, SRM advises Credit Unions and their boards on many of the important steps in completing successful mergers. This includes board advisory related to the "why's" and "how's" of a merger, successfully sourcing partners, negotiating contract terms, and rationalizing the merger for member, staff, and community benefit.

Visit [srmcorp.com](http://srmcorp.com) for more information, and follow us on LinkedIn for timely and relevant industry insights.

Peter Duffy: Managing Director of Merger Advisory Services  
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# 2025 NCUMA HAWAII CONFERENCE VENDORS



Knowledge-and-Process-Outsourced-UnderWriting (KaPOUW) offers on-demand loan underwriting services designed specifically for credit unions.

**The Challenge:** Lending volumes often fluctuate, creating a “feast or famine” cycle that makes it difficult to staff efficiently. At the same time, a shortage of well-trained underwriters and the burden of maintaining full-time staff during slow periods put pressure on budgets.

**The KaPOUW Solution:** KaPOUW delivers flexible, expert underwriting services including full-service underwriting of credit memos from A to Z, seamless completion of annual loan reviews, and both staff augmentation and full outsourcing options tailored to your institution’s needs.

**Why Lenders Choose KaPOUW:** With a variable cost structure that scales with deal flow, credit unions can expand or contract underwriting capacity as needed. KaPOUW’s experienced, vetted team operates in a remote-ready model built on secure, modern technology—delivering lower costs and higher production without added overhead.

**Who We Serve:** From smaller credit unions seeking a fully outsourced underwriting team to larger institutions needing on-demand support during peak periods, KaPOUW adapts to fit your operation.

Matt Taylor: Managing Member  
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Phone Number: 949-836-1373

Shari Taylor: President  
Email: Shari@kapouw.com  
Phone Number: 714-679-5958



A complete marketing solution, we only work with community-based financial institutions. With over 35 years of experience, we know how to get results. Hometown Bank Creative works directly with your management team to accomplish your strategic and budgetary goals. From digital platforms to traditional opportunities, we help you monetize your marketing dollars, inclusive of planning and executing your strategic marketing plan through creative design, contract negotiation, and tactical planning.

Visit [www.hometownbankcreative.com](http://www.hometownbankcreative.com) for more information.

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# 2025 NCUMA HAWAII CONFERENCE AGENDA

## **NCUMA PRE-CONFERENCE AGENDA**

*You must register for the Pre-Conference to attend.  
Pre-Conference is not part of the General Conference Registration*

### **Friday - November 7**

Registration & Meeting Location: Haleakala Ballroom & Pre-Function Area

2:00 PM - 3:00 PM

Pre-Conference Registration (for Registered Pre-Conference Attendees and Registered Guests only)

3:00 PM - 4:30 PM

“Roundtable Session: Leading Through Change-Strategic Priorities for CU Executives” facilitated by Pete Duffy

### **Saturday - November 8**

Registration, Breakfast & Meeting Location: Haleakala Ballroom & Pre-Function Area

7:30 AM - 8:45 AM

Pre-Conference Breakfast (for Registered Pre-Conference Participants and Pre-Conference Registered Guests only)

8:45 AM - 9:45 AM

“Turning Silence Into Dialogue” by Miranda Flury

9:45 AM - 10:45 AM

“Fostering Strategic Culture” by Miranda Flury

## **NCUMA GENERAL CONFERENCE AGENDA**

Reception Located on the Chapel Lawn

4:30 PM - 5:30 PM

Conference Registration and Welcome Reception for Attendees and Registered Guests  
*Sponsored by PARC Street Group, Tyfone and Payfinia*

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

### **Sunday - November 9**

Registration, Breakfast & Meeting Location: Haleakala Ballroom & Pre-Function Area

7:30 AM - 8:30 AM

Breakfast for Attendees and Registered Guests

8:30 AM - 8:45 AM

Opening Remarks

8:45 AM - 9:30 AM

“Strength in Unity: Building a Backbone for the Movement” by Tansley Stearns

9:30 AM - 10:30 AM

“Inside Washington: What Credit Union Leaders Need to Know” by Greg Mescal

10:30 AM - 10:45 AM

Coffee Break (Beverages Only Today)

10:45 AM - 12:00 PM

“Stablecoins & Credit Unions: Stabilize and Act Now on the Genius Act” by Kevin Olsen

12:30 PM - 12:45 PM

*Golf Tournament Meeting - for all Golf Tournament Players*

1:20 PM - 6:30 PM

*Optional Networking Activity: Snorkel, Sip, Sail & Sunset \$295*

*(Leaves promptly at 1:20 PM from the “Groups Entrance” - hotel entrance closest to the conference meeting space)*



# 2025 NCUMA HAWAII CONFERENCE AGENDA

## NCUMA GENERAL CONFERENCE AGENDA

### **Monday - November 10**

7:30 AM - 8:45 AM	Breakfast for Attendees and Registered Guests
8:45 AM - 10:15 AM	"The US Economy: Very Resilient, So Far-Part I" by Elliot Eisenberg
10:15 AM - 10:30 AM	Coffee Break
10:30 AM - 12:00 PM	"The US Economy: Very Resilient, So Far-Part II" by Elliot Eisenberg
12:15 PM - 1:30 PM	<i>CEO Lunch &amp; Learn: Sponsored by Wescom Resources Location: Llima (CEO Lunch is exclusively for CU CEO's. Advance sign up is requested)</i>

### **Tuesday - November 11**

7:30 AM - 8:45 AM	Breakfast for Attendees and Registered Guests
8:45 AM - 10:15 AM	"The Human Advantage: Winning in the Digital Banking Era" by Samantha Paxson
10:15AM - 10:30 AM	Coffee Break
10:30 AM - 12:00 PM	"Deep Dive Into Your Institution and Peer Group" by Jamie T. Sumner
Afternoon	<i>Optional Networking Activity: Golf Tournament - Sponsored by College Ave</i>

### **Wednesday - November 12**

7:30 AM - 8:30 AM	Breakfast for Attendees and Registered Guests
8:30 AM - 8:45 AM	Closing Remarks
8:45 AM - 9:30 AM	"Real-World Actionable AI: Solutions Your CU can Implement Immediately" by Josh DeTar
9:30 AM - 10:45 AM	"Technology is Great - Until it Isn't" by Leah Hamilton

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



# 2025 NCUMA HAWAII CONFERENCE SESSIONS

## Friday - November 7

### Roundtable Session: "Leading Through Change — Strategic Priorities for Credit Union Executives" Facilitated by Pete Duffy

Join an exclusive executive roundtable led by Pete Duffy of SRM, designed to address the most pressing strategic and operational challenges facing credit union leaders today. This dynamic session will bring together seasoned executives for a candid, peer-to-peer discussion on topics that are reshaping the future of the industry.

Discussion topics will include:

- Attracting Younger Members: Strategies to engage the next generation while maintaining strong relationships with aging members.
- Succession Planning: Preparing leadership pipelines for long-term organizational continuity.
- Growth and Profitability: Innovative approaches to strategic growth, market expansion, and maintaining strong member value.
- Cybersecurity & AI: Emerging risks, defense strategies, and opportunities for leveraging AI in operations and member services.
- Compliance & Audit Trends: Navigating evolving regulatory demands and identifying proactive internal audit approaches.
- Liquidity & Digital Assets: Managing balance sheet health while exploring opportunities in digital asset offerings.
- Executive Compensation: Structuring competitive packages that align with institutional goals and regulatory expectations.

This roundtable is a unique opportunity to benchmark with peers, challenge current thinking, and return with actionable insights. Please come prepared to discuss and ask questions. This will be a highly productive working roundtable session.

## Saturday - November 8

### "Turning Silence into Dialogue" by Miranda Flury

In every board meeting, there are often unspoken issues—those "elephants in the room" that everyone is aware of but is hesitant to address. Whether it's a critical business challenge, a looming external threat, or internal dynamics that hinder progress, these unspoken truths can stifle growth and ideation. This keynote session will explore strategies for surfacing and tackling these difficult conversations head-on with your board and executive team. This session will provide actionable insights into recognizing, addressing, and resolving these issues, ultimately strengthening your credit union.

### "Fostering Strategic Culture" by Miranda Flury

Boards and Executives have been tasked with pivoting and re-orienting to a new future in a state of great uncertainty. While the "right" path forward through these challenges will look different to each business, the Board processes, practices, and skills that will identify winning strategies will be common. This session will present specific experiences and ideas that can help your Board develop a more effective strategic orientation and promote a culture of thinking "24-7 strategic thinking" to stay ahead of change. These tools can help your credit union be ready and confident to confront the challenging decade ahead, whatever awaits.

Participant Takeaways:

- Participants will be able to define Strategic Culture.
- Participants will explore individual competencies, processes, and group dynamics that support a strategic culture.
- Participants will reflect on their own processes and how they foster (or not!) a strategic culture.



# 2025 NCUMA HAWAII CONFERENCE SESSIONS

## Sunday - November 9

### ["Strength in Unity: Building a Backbone for the Movement" by Tansley Stearns](#)

In a noisy media environment, individual credit unions often struggle to effectively communicate their purpose, relevance, and impact. Tansley Stearns, Backbone's board chair, will unpack why Backbone Coalition exists: to bring coherence, visibility, and influence on the credit union movement. Attendees will explore how a unified voice can shift public perception, awareness, and strengthen the cooperative difference in the eyes of consumers. More than branding, this talk demonstrates how collaboration in action can become a force multiplier. Walk away with tangible action your credit union can take and inspiration that credit unions don't just need allies, we need a shared megaphone.

### ["Inside Washington: What Credit Union Leaders Need to Know" by Greg Mesack](#)

Washington, D.C. is constantly evolving—and the policies debated there directly shape the future of credit unions. In this timely session, Greg Mesack, Senior Vice President of Government Affairs at America's Credit Unions, will provide credit union executives with an insider's look at the issues and opportunities at the center of the nation's capital.

Greg will share the latest insights on legislative priorities, regulatory developments, and the broader political climate influencing financial services. From consumer protection and data security to regulatory modernization and the essential role of credit unions in their communities, you'll leave with a clear understanding of what matters most in Washington right now.

This session will also highlight how advocacy efforts are moving the needle—and why your engagement is essential to ensure the credit union movement remains strong. Whether you're a seasoned advocate or just starting to engage, Greg's perspective will help you connect the dots between Washington's heartbeat and your credit union's future.

### ["Stablecoins & Credit Unions: Stabilize and Act Now on the GENIUS Act" by Kevin Olsen](#)

Stablecoins aren't an issue for the future. They're here today, and the Guiding and Establishing National Innovation for US Stablecoins (GENIUS) Act makes it clear that credit unions of every size must prepare. For community and mid-sized credit unions, waiting on the sidelines risks losing clients to larger competitors and Fintechs already moving ahead. In this fast-paced, expert-led webinar, the Payments Professor, Kevin Olsen, explains what the GENIUS Act means for your organization, how stablecoins connect with instant payments and tokenized deposits and the immediate steps you need to take to stay competitive and compliant. The message is simple: act now, or risk being left behind. Attend this session to learn where and how your credit union will fit into the stable coin revolution.

## Monday - November 10

### ["The US Economy: Very Resilient, So Far" Part I by Elliot Eisenberg](#)

Attend this entertaining and informative presentation on the economy and learn from Dr. Eisenberg how GDP, which includes household consumption, corporate spending, government spending, and net exports, are likely to perform over the next 12 months given likely expansionary monetary and fiscal policies coming out of Washington DC. Learn how different sectors of the economy are performing and likely to perform, with particular attention devoted to tariffs and imports, energy, construction, and critically the labor market and as a result how inflation will behave and as a result what the Fed is likely to do with short-term interest rates over the next year, and how long-term rates are likely to behave as a result. Elliot will then turn his attention to net interest margins, ROA, the shape of the yield curve, loan loss reserves, default rates on auto loans, credit cards, home mortgages, lending activity, and M&A activity among credit unions. Dr. Eisenberg will also look at auto sales, consumer sentiment, small business sentiment, CEO sentiment, and the rest of the macro economy.

### ["The US Economy: Very Resilient, So Far" Part II by Elliot Eisenberg](#)

This session will focus almost exclusively on real estate including retail, office, industrial, commercial, lodging, and agricultural but with particular attention being devoted to residential real estate including multifamily but specifically the single-family residential housing market. Attention will be devoted to explaining the many problems the residential housing market is contending with including high prices, an on-going lack of inventory, high input costs and the regulatory barriers which continually push up prices for new and existing housing. Elliot will also discuss why builders are unable to build sufficient new units to satisfy demand brought on by demographic changes, the impact of the steady reversal of the Work From Home phenomenon and what it means for regional home price appreciation rates. This session will also carefully discuss the likely path of housing starts, existing housing sales, home prices, and mortgage applications including rate & term, cash-out, and ARMs. This session will end by briefly comparing economic conditions across all 50 states. Dr. Eisenberg then looks forward to taking questions from the audience.



# 2025 NCUMA HAWAII CONFERENCE SESSIONS

## Tuesday - November 11

### "The Human Advantage: Winning in the Digital Banking Era" by Samantha Paxson

As financial technology reshapes banking and AI changes how members interact with their finances, credit unions must decide how to compete. This keynote examines how credit unions can use their strongest asset – genuine human relationships – while adopting the right technology to grow and stay relevant.

#### Key Takeaways for Leaders:

- **Strategic Positioning:** Transform member-centricity from a cultural value into a measurable growth driver that creates competitive advantage in a market disrupted by both banks and fintechs.
- **Technology Integration Framework:** Learn practical ways to implement AI and digital tools that strengthen human relationships rather than replace them.
- **Board Governance Insights:** Understand how board oversight must evolve to balance innovation with cooperative principles and member trust.
- **Fintech Partnership Strategies:** Navigate the dual nature of fintechs as both competitors and collaborators – learn when to compete, when to partner, and how to structure win-win relationships that benefit members.
- **ROI of Human Connection:** Review data showing how investing in human-centered service design delivers real returns in member acquisition, retention, and wallet share.

This session gives C-suite executives and board members practical strategies for embracing digital transformation while preserving the human touch that sets credit unions apart. Drawing on exclusive consumer research insights from her role as EY Advisor in Residence, Samantha Paxson shares proprietary data on emerging member expectations and behavioral trends that credit unions can leverage immediately. Attendees will leave with a clear set of actions for transforming member-centricity from an ideal into a measurable growth strategy that drives real competitive advantage.

### "Deep Dive into Your Institution and Peer Group" by Jamie T. Sumner

In the "Deep Dive into Your Institution and Peer Group" session, you'll gain fresh insights into how your institution's performance compares to the broader industry. Each participant will receive a customized performance report tailored to their institution, which will be used as a key reference throughout the presentation. Think of this as a pre-strategic planning session—an opportunity to establish a solid understanding of where you are today before defining where you want to go. Using a guided self-assessment and our proprietary risk-versus-reward model, you'll examine the key drivers of performance and assess the related risk levels against both a benchmark and peer group.

#### The key learning objectives are:

Identify how your institution stacks up against peers and benchmarks.

Leverage your customized performance report for insight and discussion.

Apply the risk-versus-reward model to key performance drivers.

Build a strong foundation for future strategic planning.

## Wednesday - November 12

### "Practical AI: Real-Use Solutions You Can Put to Work Right Away" by Josh DeTar

Nearly everyone is talking about AI as a magical fix—but for many it can feel overwhelming, costly, and out of reach. This session cuts through the hype. Join Josh DeTar of Tyfone for an energetic and hands-on presentation showcasing five actionable, AI use cases designed specifically for CU executives and directors. No large-scale deployments. Josh walks you through X specific examples for instant productivity - he tells you which tools to use, gives you the prompts to copy and paste, and you can apply these first thing when you get back to your credit union. This session is ideal for CU leaders looking to boost productivity, reduce friction, and save valuable time. Level the playing field: turn AI from intimidating concept into accessible toolset—starting now.

### "Technology is Great – Until It Isn't" by Leah Hamilton

The rapid rate of fraud and cyber risks have even the most savvy credit unions on edge when trying to balance their members' needs for faster, efficient, simple financial solutions. Join this session as we highlight the top 10 fraud and cyber risks credit unions face and what you could (or should) be doing to mitigate those risks. We will also highlight key reporting information essential for the Board's strategic and risk management decisioning to consider when establishing your appetite for risk.



# 2025 NCUMA HAWAII CONFERENCE SPEAKERS



## Peter Duffy

Managing Director  
SRM

Peter Duffy works with Credit Unions and banks nationwide in competitive analysis, investment portfolio development, charter decisions, board meetings, loan portfolio sales and ALM. Duffy is the former Chairman of the Credit Union Executive Society Financial Suppliers Advisory Committee and has been a frequent speaker at credit union and bank conferences since 1996, including the November 2006 AEI Panel on the CU Charter. Duffy has worked with credit unions and banks since 1993, has written a monthly column for C.U.E.S. and has been published in C.U. Times and C.U. Journal discussing issues such as competitiveness, investments, asset/liability management, the economy, the right metrics for CUs and charter decisions. Prior to Sandler

O'Neill, Peter Duffy spent 11 years at the Procter and Gamble Company in sales and sales management where he was involved in many test market initiatives for the company. Duffy was also a Sales Manager for Sealy Mattress and National Foods. Most recently, he spent 10 years at First Empire Securities and a year and a half at KBW both in New York. Duffy is a 1977 graduate of Texas Christian University in Ft. Worth, Texas where he earned a B.A. in Business Management with a Minor in Marketing. Duffy is a 1973 graduate of Plano High School.

Peter Duffy lives in New York, has coached youth sports for over 30 years and fly fishes whenever he can make it happen.



## Miranda V. Flurry

President  
Hawkeye Strategies, Inc.

As the President of Hawkeye Strategies, Miranda lives out her purpose: Helping to turn light bulbs on. She works with Cooperative Boards and Executives across North America to support their governance and strategy needs and in turn, she helps their people and communities. Her vast experience as a Professional Facilitator, International Speaker, and Expert Educator for Cooperatives enables her to provide a seamless and engaging experience that is tailored to each audience. Miranda has supported Boards, Executives, Regulators, Credit Union Peer Groups, Credit Union Centrals, Credit Union Service Organizations (CUSOs), and Credit Union Advocacy groups. She has spoken at conferences including the World Council of Credit Unions (WOCCU), the

BC Financial Services Authority Director's Forum, and the Canadian Credit Union Association (CCUA). She offers her clients the knowledge gleaned from specialized expertise, tempered with the wisdom of wide-ranging experience from diverse industries. Miranda completed her undergraduate degree from the University of Guelph, a Master's level degree from Memorial University of Newfoundland, and an Executive MBA from the University of Fredericton. She has also earned a designation in Advanced Cooperative Governance. Miranda has held Board Director roles on Cooperative, Regulatory, and Private Boards and is currently a Director on one of the largest and most complicated Cooperatives in North America, Federated Cooperatives Limited. In her spare time, Miranda is a mentor with Futurpreneur where she helps new entrepreneurs successfully start their businesses. She is also a CrossFit enthusiast... but don't get her started on this topic, she'll have a hard time stopping!



## Tansley Stearns

president & ceo  
Community Financial Credit Union

Tansley embodies an unwavering spirit, where "impossible" is a foreign concept. She is a dynamic leader with over 26 years of transformative impact in the credit union industry. As ceo of Community Financial, she champions a culture where curiosity thrives, innovation is in the DNA, and strategy is an evolving art. Tansley drives sustainable financial performance by ensuring execution while fostering in-house solutions, encouraging experimentation, and investing in technologies that bridge physical and digital worlds. In 2024, she was honored with induction into America's Credit Union Museum's Herstory Exhibit, recognizing her enduring contributions. Under her leadership, In the Cellar has raised over \$3.2 million in three years to support mental

health programs through Children's Miracle Network Hospitals. Tansley's legacy, spanning roles with Filene Research Institute to FourLeaf FCU, is defined by her devotion to people, progress, and purpose, leaving every community she touches better than she found it.



# 2025 NCUMA HAWAII CONFERENCE SPEAKERS



## **Greg Mesack**

Senior Vice President for Advocacy  
America's Credit Unions Legislative,  
Political and Regulatory Divisions

As the Senior Vice President for Advocacy, Mesack leads the America's Credit Unions legislative, political and regulatory divisions. For the past two years Mesack has been named one of the top lobbyists by The Hill newspaper. Mesack joins Americas Credit Unions having held a similar role at the National Association of Federally-Insured Credit Unions. Prior to NAFCU, Greg was part of the law and lobbying firm of GrayRobinson where he advocated on behalf of clients to policymakers and regulators. Prior to that he was at Eris Group where he was Managing Director and Partner. His clients have included the Mortgage Bankers Association,

Financial Services Institute, Federal Home Loan Bank of Atlanta, TransUnion, PayPal, Western Union, and Nike. Previously, Mesack was Vice President of Government Affairs for America's Community Bankers. Before joining the private sector, Mesack worked on Capitol Hill where he advised several members of Congress. Mesack holds a master's of business administration degree from the George Washington University and a bachelor's degree in political science and history from Miami University.



## **Kevin Olsen**

Payment\$ Professor, Executive Coach,  
Author, Inspirational Speaker

Kevin Olsen is the Payments Professor, bringing enthusiasm and motivation to presentations. Viewing the world as a classroom which is exemplified in the professor's "edutainment" (ed-u-tain-mint (noun\ When education is motivating, informative, and fun) style of training as he seeks to educate and inform all on the latest developments and trends in the fascinating world of electronic payments Kevin develops programs, presentations, and articles designed to orient and educate financial professionals on a multitude of electronic payment topics. Kevin is also a certified business coach, helping lead organizations to innovate and communicate in the ever-changing world of payments. This includes building payment strategies with a focus

on product development and use cases for faster payments (ACH, Stablecoin, RTP & FedNow). You can find the Payments Professor on YouTube, Instagram, through the Payments Podium podcast, and usually speaking at an event near you.

Among his many certifications, Kevin is an Accredited Faster Payments Professional (AFPP), an Accredited ACH Professional (AAP), an Accredited Payments Risk Professional (APRP), a NCP (National Check Payments Certification), and a Certified High-Performance Coach (CHPC), and holds a master's in industrial organizational psychology from Liberty University.



## **Elliot Eisenberg, Ph.D.**

Economist

Elliot Eisenberg, Ph.D. is a nationally acclaimed economist and public speaker specializing in making the arcana and minutia of economics fun, relevant and educational. He holds a B.A. in economics with first class honors from McGill University, as well as a Masters and Ph.D. in public administration from Syracuse University. Eisenberg, formerly a Senior Economist with the National Association of Home Builders in Washington, D.C., is a frequent speaker on topics including: economic forecasts, economic impact of homebuilding, consequences of government regulation, cost-benefit analysis, prudential use of financial derivatives, strategic business development and other current economic issues. He is the creator of the multifamily stock index (the first nationally recognized index to track the total return of public firms principally involved in the ownership and

management of apartments), the author of more than seventy articles and serves on the Editorial Board of the Encyclopedia of Housing. He has spoken to hundreds of business groups and associations, frequently as keynote speaker, and is a frequent guest lecturer on college campuses. Dr. Eisenberg has been invited to testify before lawmakers and is often asked to comment on proposed legislation. His research and opinions have been featured in Bloomberg, Business Week, Forbes, Fortune, and many other publications. He is regularly featured guest on several talk radio shows, is often seen on television and authors a daily 70 word commentary on the economy. His interests include keeping the rate of restoration of his 60 year old house ahead of the rate of deterioration and doting on his daughter. He loves ice hockey and talking economics with crowds large and small!



# 2025 NCUMA HAWAII CONFERENCE SPEAKERS



## Samantha Paxson

Growth & Business Transformation Catalyst  
Financial Industry Influencer

Samantha Paxson is a leading strategist in growth and business transformation. She's known for her expertise in uniting technology, operations, and customer experience to enhance revenue, retention, and market reach. With 20 years of C-suite experience, she served as EVP and CXO at Co-op Solutions, where she helped lead the company's transformation into a platform-based ecosystem serving 3,500 financial institutions and 60 million consumers. Her leadership extends across multiple corporate boards, including a credit union service organization, a lending technology firm, and an insurance technology company. She is Chief Growth Officer of Acumen Financial Advantage, a consultative executive benefits firm serving mission-driven organizations and is an Advisor in Residence for EY, one of only seven such roles in the United States. Most recently, Samantha founded Power & Light Collaborative, a strategic growth consultancy focused on helping fintechs and community-centered financial institutions identify growth opportunities that prioritize consumer outcomes and optimize financial performance. Sam resides in Southern California, where her teen age son keeps her very human-centered.



## Jamie Sumner

Partner  
Velligan-Blaxall Consultants

Jamie Sumner, Partner at Velligan-Blaxall Consultants, has been trusted advisor to community and regional financial institutions over the span of his 25+ year career. His clients seek him out for guidance in asset/liability management, risk and reward profiling, and strategic capital planning. He works closely with boards and executive teams to translate complex analytics into clear, actionable insights that strengthen performance and governance. Prior to joining VBC, Jamie held senior roles in banking and consulting, building expertise in ALM models, capital planning, and investment strategies. A frequent speaker at industry conferences and banking schools, Jamie is known for his practical, engaging approach to balancing performance with risk. Outside the office, Jamie enjoys time outdoors with his family—often on the water in a kayak or paddle board—and pursues his interest in sustainable architecture that blends buildings with landscapes for greener, self-sufficient living.



## Josh DeTar

EVP of Evangelism  
Tyfone

Josh DeTar, EVP of Evangelism at Tyfone, is a passionate advocate for leveraging technology to empower credit unions. A self-described "tech geek" whose "tongue is purple from drinking the community financial institution (CFI) Kool-Aid," Josh is renowned for transforming complex tech concepts into actionable strategies. During his 8+ year tenure at Tyfone, Josh's extensive experience in driving technological adoption and impact positions him uniquely to deliver practical, implementable solutions. A personal recipient of a credit union's transformative impact on his own financial journey, Josh's deep-seated commitment fuels his mission to empower CFIs with innovative digital banking solutions that foster financial wellness. He genuinely believes, "I want to see more people live financially healthy lives with positive financial futures. Financial independence is very freeing." Beyond his role at Tyfone, Josh's dedication to community and collaboration is evident. He hosts Tyfone's "Digital Banking Podcast," a top-ranked industry podcast where he's interviewed over 130 guests, including Financial Institution leaders and innovators, to industry consultants, and fintech pioneers. He also actively serves his community as a board member and chair of the supervisory committee for Cutting Edge Federal Credit Union. His passion for giving back extends to leading Java4Kids, a partnership between Tyfone and Credit Union 4 Kids (CU4Kids) that raises significant funds for Children's Miracle Network Hospitals through coffee sales, aiming to expand its reach across the country. His influence and expertise have been recognized, including being named a Credit Union Times' 2024 LUMINARIES Finalist in the Rising Star category, and his "Digital Banking Podcast" consistently ranks among the top global podcasts.



## Leah Hamilton, JD

Director Education Services | Chief Compliance Advisor  
Sentry Advisors

With nearly 30-years of experience in the financial services industry, Leah's in-depth compliance knowledge spans Lending, Deposits, BSA/AML, and Compliance Risk Management. Her diverse skills, from software programmer to legal counsel to compliance advisor make Leah a results-oriented and strategic compliance professional. Throughout her career, banks, credit unions, fintechs, and federal and state associations have engaged her for compliance advice and training at all levels and diverse audiences, including board, senior management, and state and federal examiners. Leah provides management and staff valuable insight to effectively understand, identify, manage, and mitigate compliance risk, including cyber, synthetic identity and fraud risks.