

AUGUST 2 - 4, 2026

ISLE OF PALMS, SC



Meet Us!

Southeast Regional Directors' Conference

A signature gathering for credit union directors
and supervisory committee members.

2026





WELCOME

See what the coast can teach you.

Picture sunrise over the Atlantic, sand still cool beneath your feet, and a setting designed not just to inspire but to equip you with the knowledge and confidence to lead.

Hosted this year by the Carolinas Credit Union League, the Southeast Regional Directors' Conference brings together credit union board directors and supervisory committee members from across the region for high-impact learning in a truly exceptional setting.

This is more than a conference; it's a valuable investment in your role as a volunteer leader. Whether you're meeting training expectations or simply striving to stay ahead of industry challenges, this event provides relevant, practical education at a fraction of the cost of comparable programs.



AGENDA

Today's credit union leaders are expected to navigate increasing complexity, oversight and accountability. We've designed this agenda to deliver meaningful value while supporting your role as a credit union leader.

Sunday, August 2

11:00 - 3:30 p.m.

Registration

1:00 - 1:15 p.m.

Welcome & Introductions

Dan Schline, Carolinas Credit Union League

1:15 - 2:15 p.m.

Keynote: Remarkable! How Credit Unions Can Make Remarkable Experiences

Stephen Arnold, Filene

2:20 - 3:15 p.m.

Keynote: Leading Through Change: Practical Strategies for Credit Union Boards & Supervisory Committees

Linda Lafortune, CUInsight

4:30 - 6:30 p.m.

Welcome Reception

Monday, August 3

8:00 - 9:00 a.m.

Breakfast

8:00 a.m. - 2:00 p.m.

Registration

9:00 - 9:25 a.m.

Welcome / AACUL Overview

Brad Miller, American Association of Credit Union Leagues

9:25 - 10:10 a.m.

Keynote: Top Strategic Priorities for Credit Unions

Stephen Arnold, Filene

10:15 - 11:00 a.m.

Breakout Sessions

DIRECTORS | Understanding Your Board Packet

Ancin Cooley, Synergy Credit Union Consulting

SUPERVISORY | We Found Internal Fraud, Now What?

A Guide to Proper Investigations

Deron Rossi, DJR Consulting

11:00 - 11:15 a.m.

Coffee Break

11:15 a.m. - 12:00 p.m.

Breakout Sessions

DIRECTORS | Questions You Should Be Asking Management

Deron Rossi, DJR Consulting

SUPERVISORY | The Month-to-Month Work of an Effective Supervisory Committee

Ancin Cooley, Synergy Credit Union Consulting

Schedule subject to change

AGENDA CONT'D

12:00 - 1:30 p.m.

1:30 - 2:30 p.m.

3:45 p.m. Until

Lunch

Keynote: Risk Appetite in Plain Language

Ancin Cooley, Synergy Credit Union Consulting

Activities:

- Savor the Flavors Tour (3:45 – 7:45 p.m.)
- Indigo Dyeing (4:30 – 6:30 p.m.)
- Sunset Dolphin Cruise (5:30 – 8:30 p.m.)

Tuesday, August 4

8:00 - 9:00 a.m.

8:00 a.m. - 12:00 p.m.

9:00 - 9:50 a.m.

Breakfast

Registration

Breakout Sessions

DIRECTORS | **BSA Training for the Board**

Jeanne Couchois, Carolinas Credit Union League

SUPERVISORY | **Credit Union Examinations**

Speaker TBA, NASCUS

9:50 - 10:05 a.m.

10:05 - 11:00 a.m.

Coffee Break

Breakout Sessions

DIRECTORS | **Executive Benefit Plans**

John Atkinson, TruStage

SUPERVISORY | **Risk & Compliance Update**

Jeanne Couchois, Carolinas Credit Union League

11:00 a.m. – 12:00 p.m.

12:00 - 1:00 p.m.

1:00 p.m.

Keynote: Strategic Thinking at Every Level

DeeDee Myers, DDJ Myers

Lunch on Your Own

Activities:

- Golf Outing (1:00 p.m.)
- Private Historical Carriage Ride & Market Excursion (1:00 – 5:00 p.m.)

6:00 - 9:00 p.m.

Closing Reception & Dinner Featuring The Emerald Empire Band

Schedule subject to change

SESSIONS



Keynote Sessions

Remarkable! How Credit Unions Can Make Remarkable Experiences

Stephen Arnold, Filene

Filene's flagship 2026 presentation explores what makes a credit union truly remarkable. Drawing on Filene research, learn the strategic and tactical drivers of differentiation, from digital innovation and data use to governance and employee and member experience, to stand out in a competitive marketplace.

Leading Through Change: Practical Strategies for Credit Union Boards & Supervisory Committees

Linda Lafortune, CUInsight

Change is constant, and effective governance creates stability. This session explores how boards and supervisory committees can oversee strategic change, monitor risk, and support leadership through uncertainty. Learn how human dynamics, clear roles, and the right questions, indicators, and dashboards strengthen resilience, accountability, and long-term member trust.

Top Strategic Priorities for Credit Unions

Stephen Arnold, Filene

An overview and facilitated discussion of the most significant strategic decisions credit union leaders will

face in 2026. Explore emerging trends and disruptive forces shaping the industry, with actionable insights to future-proof your organization, anticipate challenges, and seize the most valuable opportunities in the year ahead.

Risk Appetite in Plain Language

Ancin Cooley, Synergy Credit Union Consulting

This session demystifies enterprise risk management and helps credit union boards define risk appetite in practical terms. Learn how shared understanding between the board and management can guide decisions around lending, investments, growth, and innovation, creating clearer guardrails, fewer surprises, and greater trust.

Strategic Thinking at Every Level: Building a Culture of Forward-Looking Leadership

DeeDee Myers, DDJ Myers

Strategic thinking isn't just a leadership skill; it's a mindset every board member and supervisory committee member must embrace to guide their credit union's future. This closing session challenges every leader in the room to elevate their perspective, align around a shared vision, and walk away better equipped to ask the right questions, challenge assumptions, and lead with purpose at every level of governance.



■ Fun Fact

With roots stretching back an **estimated 25,000 years**, Isle of Palms has been known as Hunting Island and Long Island over time, and its coastline remains a great place to catch sight of dolphins, pelicans and ospreys.

SESSIONS



Breakouts for Directors

BSA Training for the Board

In this session, Jeanne Couchois provides board members with a practical overview of BSA/AML and OFAC responsibilities. Attendees will review program fundamentals, recent regulatory updates and effective oversight practices to strengthen governance of financial crime risk.

Executive Benefit Plans

John Atkinson of TruStage explores how to design executive benefit plans that balance executive goals with the credit union's long-term strategy. Learn how intentional customization, clear objectives, and risk-retention tradeoffs support leadership stability and organizational value.

Questions You Should Be Asking Management

Deron Rossi challenges boards to move from oversight to insight. In a rapidly changing credit union landscape, this session shows how asking the right strategic questions strengthens board-management partnership, elevates governance and transforms routine oversight into visionary leadership.

Understanding Your Board Packet

Ancin Cooley is here to help you decode the board packet and ask better questions. Learn how to interpret key financial reports and dashboards, identify what deserves deeper discussion, and engage more surely with management—leading to shorter meetings, clearer approvals, and more productive board-management conversations.



Breakouts for Supervisory Leaders

Credit Union Examinations

Presented by NASCUS, this foundational session demystifies the credit union examination process. Learn what examiners look for, what to expect before, during, and after an exam, and how results are communicated—building confidence, preparedness, and transparency across leadership.

The Month-to-Month Work of an Effective Supervisory Committee

Ancin Cooley outlines the monthly work of an effective supervisory committee. This session provides a practical operating calendar covering audits, examiner engagement, financial statement review, and documentation—helping committees build consistent habits, meet regulatory expectations, and create visibility without needless burden.

Risk & Compliance Update

Designed for supervisory committee members, Jeanne Couchois delivers a high-level update on recent and emerging regulatory developments. The session explores NCUA and agency rulemaking, regulatory trends and key considerations to support effective risk, compliance and governance oversight.

We Found Internal Fraud, Now What? A Guide to Proper Investigations

Deron Rossi provides a step-by-step guide for responding to internal fraud. Learn how to preserve evidence, conduct compliant investigations, coordinate with legal counsel and regulators, and avoid common missteps. A repeatable investigation process helps protect your credit union's reputation, operations and legal standing.

SPEAKERS



STEPHEN ARNOLD

Chief Strategy & Enterprise Dev. Officer
Filene



JOHN ATKINSON

Sr. Executive Benefits Specialist
TruStage



ANCIN COOLEY

Founder and Principal
Synergy Credit Union Consulting, Inc.



JEANNE COUCHOIS

SVP Risk Mgmt. Resources & Gen. Counsel
Carolinas Credit Union League



JOHN KOLHOFF

SVP of Policy and Supervision
NASCUS



LINDA LAFORTUNE

Director of Learning & Client Support
CUInsight



CRAIG MONEY

VP, Reg. Affairs & AML/AFC Compliance
NASCUS



DEEDEE MYERS

CEO
DDJ Myers



DERON ROSSI

Founder
DJR Consulting

REGISTRATION



Set along the coast at Wild Dunes Resort, the **2026 Southeast Regional Directors' Conference** offers an exceptional value for credit union volunteers. Registration includes access to all keynote sessions and breakout programming, most meals throughout the conference, and evening receptions, entertainment, and networking opportunities — all designed to leave attendees informed and energized.

EVENT PRICING

Conference Tickets | \$1,049 Attendee; \$499 Guest

Add-Ons | Attendee & Guest Activities (\$110 - \$245)

Take advantage of these add-on experiences ranging from an **Indigo Dyeing Workshop** to a **Sunset Dolphin Cruise** to a **Golf Outing on the Harbor Course**, and more. These popular activities have limited capacity, so register early by June 26, 2026. [Visit the event page](#) to learn more.

Event Registration Deadline: July 10, 2026

Cancellations: Each cancellation received in writing via email or fax by **July 17, 2026**, is eligible for a refund of the amount paid minus a 20% administrative fee. Substitutions are accepted any time prior to the event. See the event page for more details.



ACCOMMODATIONS

RESORT INFORMATION

Wild Dunes Resort - Sweetgrass Inn, Boardwalk Inn and Residences

5757 Palm Boulevard, Isle of Palms, SC 29451
866-359-5593

Conference Venue

All conference sessions and official events will take place at Wild Dunes Resort. **The League's room block at Wild Dunes Resort is now sold out.** Limited 1-3 bedroom suites remain available at [the Residences at Wild Dunes](#), starting at \$697+/night, plus taxes and fees.

Alternate Hotel Option

An additional room block has been established at:

Courtyard by Marriott – Mt. Pleasant

1251 Woodland Ave., Mt. Pleasant, SC 29464

Rates starting at \$175+/night

Reservation Deadline: July 10, 2026



[Reserve Online](#)



The Spa at Sweetgrass at Wild Dunes Resort

Located on property, the spa is a 14-treatment room facility offering massages, facials, body rituals, nail services, and alternative healing treatments including Reiki Energy Healing, Sound Healing, and Yoga. As you book your stay, take the next step to reserve your spa experience directly with the hotel. [Visit the event page](#) to learn more.

Cancellations: For details on conference and hotel cancellation procedures and applicable policies, please [visit the event page](#).

2026

Questions?

Contact the Carolinas Credit Union League

Email: development@carolinasleague.org

Phone: 800.822.8859, ext. 141 or 582

srcus.org/se-regional-directors-conference