



# SENIOR LEADERSHIP FORUM

**OCTOBER 15-16**

**WILD DUNES RESORT**

5757 Palm Blvd | Isle of Palms, SC 29451

**2025**

Powered by the Carolinas Credit Union League



A FORUM EXCLUSIVELY FOR  
**SENIOR LEADERS**

---

This unique two-day experience provides the opportunity for non-CEO leaders from large credit unions to learn from industry innovators, and network and collaborate with peers on challenges and solutions.

||

BEFORE YOU ARE A LEADER, SUCCESS IS ALL ABOUT GROWING YOURSELF. **WHEN, YOU BECOME A LEADER SUCCESS IS ALL ABOUT GROWING OTHERS.**

||

Jack Welch





# The Agenda

## WEDNESDAY, OCTOBER 15

12:00 PM

**Welcome Lunch**

1:00 – 4:30 PM

**Turning Strategy into Action - Executing Your Plan for Growth and Income Enhancement**  
Ancin Cooley | Synergy Credit Union Consulting

4:45 – 5:30 PM

**Open Forum**

6:00 PM

**Group Dinner at Wild Dunes- Croquet Lawn**

## THURSDAY, OCTOBER 16

8:00 – 9:00 AM

**Breakfast**

9:00 – 10:30 AM

**Navigating Financial Horizons**  
Tim Gardner | CDC Federal Credit Union

10:45 AM – 12:15 PM

**Charting the Now: Real-World AI for Real-World Impact**  
Sheri Fitts | Sheri Fitts & Co.

12:15 AM

**Lunch**

*Schedule subject to change*



# The Sessions

## Turning Strategy into Action - Executing Your Plan for Growth and Income Enhancement

**Ancin Cooley** | Synergy Credit Union Consulting

Many credit union strategic plans fail due to a lack of alignment across departments, highlighting that success requires integrated, organization-wide execution—not isolated strategies.

In this action-based workshop, Ancin Cooley, experienced leader, risk manager, and former examiner, will teach you how to break down your strategic vision into these critical components, ensuring you achieve your organizational goals. Additionally, we will incorporate lessons learned from Objectives and Key Results (OKRs) and investment results, as well as aspects of the Four Disciplines of Execution to provide a holistic execution framework.



## Navigating Financial Horizons

**Tim Gardner** | CDC Federal Credit Union

This presentation explores key strategies for building a robust balance sheet that thrives in any economic climate. Attendees will learn how to effectively manage yield, liquidity, and risk while also safeguarding assets and capital.

Whether navigating market volatility or seeking sustainable growth, this session will provide useful tools for today's balance sheet managers. With practical insights, you'll gain the confidence to make informed, strategic decisions, even in an uncertain market like 2025.



# The Sessions



## Charting the Now: Real-World AI for Real-World Impact

Sheri Fitts | Sheri Fitts & Co.

AI isn't on the horizon — it's already reshaping how financial leaders think, operate, and serve. From ChatGPT and Perplexity to Claude, Gamma, Gemini, and beyond, today's tools offer immediate, strategic value—without requiring a tech background or a full digital overhaul.

This hands-on session is designed specifically for senior leaders of larger credit unions. Together, we'll cut through the hype and explore the real-world use of AI to amplify your credit union's capabilities —enhancing member experience, improving internal efficiencies, and unlocking new pathways for growth.



# The Fun



## Group Dinner at Wild Dunes - Croquet Lawn

Step into an evening of Lowcountry elegance and coastal charm with cocktails and dinner on the Wild Dunes Resort croquet lawn.

Surrounded by towering palms and a warm ocean ambiance, indulge in a coastal-inspired dinner crafted from the freshest local ingredients. From grilled seafood and savory Southern favorites to artisan desserts, every dish is designed to delight.

Whether mingling over cocktails, enjoying fireside conversation, or taking a stroll on the beach, this after-event dinner promises a relaxing end to your day.



# Where You'll Stay

## WILD DUNES RESORT



 5757 Palm Blvd | Isle of Palms, SC 29451

Hotel reservations are available for \$295 per night plus tax through September 14. Valet parking is \$35 plus tax per night. No self-parking available.

[BOOK YOUR ROOM](#)

## Registration

Registration is \$499 per person and is now open through September 22!

[REGISTER TODAY](#)

Cancellation details: Each cancellation received in writing via email or fax by **September 19, 2025** is eligible for a refund of the amount paid minus a \$75 administrative fee. Substitutions are accepted anytime prior to the event.





SENIOR  
LEADERSHIP  
FORUM

SPONSORED BY



FIND MORE EVENTS AT [CAROLINASLEAGUE.ORG/EVENTS](https://CAROLINASLEAGUE.ORG/EVENTS)