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Corelation Unites Credit Union Leadership at Annual CEO & CTO Forum

SAN DIEGO - October 20, 2023: Credit union core processor Corelation, Inc. successfully convened its third annual CEO & CTO Forum on October 18-19, 2023, bringing together 160 attendees in San Diego, CA. The event was crafted to leverage in-person interactions and cooperative endeavors, featuring engaging presentations and extensive opportunities for meaningful dialogues.

Throughout the two-day forum, a diverse range of captivating sessions led by industry experts delved into various subjects such as cyber-security, macro trends, payment card security, lessons from the cable industry, and much more.

“I really enjoy being a part of this special group at Corelation's CEO & CTO Forum. The attendees are forward-thinking and aspire to do more for their members, with a profound interest in discovering what's possible,” said Chief Executive Officer of CPM Federal Credit Union, James Gergen. “Spending time with this group of innovative, creative people is such an incredible use of my time.”

The schedule for the first day featured general sessions that kicked off with a keynote presentation by Mike Kelly, Founder & CEO of TeamOnUP, who shared insights on enhancing the effectiveness of credit unions. Later, participants gained valuable knowledge regarding the most recent cyber threats and risk reduction strategies from Jon Sternstein, CEO of Stern Security.

On the second day, participants were divided into distinct tracks customized for both CEOs and CTOs. The CEO track encompassed a variety of subjects, including an exploration of macro trends influencing financial services, spearheaded by Sarah Howell, Head of Partnerships at Infinant, Inc., and Dan Kramer, Executive Vice President of SHAZAM Network. There was also an in-depth exploration of the capabilities of Generative AI, led by Henry Iverson, Co-Founder and Chief Customer Officer of Boost.ai; as well as a CEO workshop on elevating the performance of financial institutions facilitated by Mike Kelly.

The sessions tailored for CTOs delved into more comprehensive discussions with a particular focus on data and security-related themes. These included a presentation examining the advantages and disadvantages of instant payments and open banking, guided by Jorge Jimenez, President of Juniper Payments. Additionally, Corelation's Chief Technology Officer Dawn Sirras, Chief Innovation Officer Jeff Dent, and Director of Software Development Eben Maat engaged in a conversation on data warehousing and analytics. Lastly, Director of Security, Privacy and Risk Services at RSM, Brian Frey delivered an overview on payment card security as well as the current compliance requirements for organizations using KeyStone.

“The CEO & CTO Forum aims to unite our industry, and it's truly gratifying to witness our community coming together, igniting an avalanche effect of engagement,” expressed Corelation President Rob Landis. “We extend our heartfelt gratitude to our credit union partners for their commitment and for fostering a collaborative environment.”

About Corelation, Inc.

Based in San Diego, CA, Corelation is the innovative core processor for today's credit union. This solution is a person-centric system that empowers credit unions to offer the best member service possible, enhancing their value for member attraction and retention. In terms of industry experience, Corelation's staff has dedicated their careers to creating core systems and providing unparalleled client service. For more information, visit www.corelationinc.com.

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Corelation President Rob Landis speaking at the CEO & CTO Forum