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Corelation's 2024 CEO & CTO Forum Inspires Innovation and Collaboration in Credit Union Leadership

SAN DIEGO - October 23, 2024: Corelation, Inc. proudly hosted its 2024 CEO & CTO Forum, gathering top leaders from the credit union industry on October 15-16 in San Diego, CA. The event gathered 166 attendees, including credit union executives and technology leaders from across the country, to explore innovations, share best practices, and discuss the future of financial technology. The forum fortified Corelation's commitment to empowering credit unions through innovation and partnership with insightful presentations and collaborative sessions. It provided engaging discussions and networking opportunities, all centered on industry leadership.

Throughout the two-day forum, industry leaders led a series of engaging sessions covering a wide array of topics that sparked many informal conversations during the open discussion time. These topics explored leadership dynamics and the impact of community-focused business models. They also addressed the alignment of people, processes, and technology, along with the use of real-time data and analytics to enhance decision-making and reveal hidden opportunities within banking systems.

"The forum was fantastic, filled with engaging presentations and a strong sense of open collaboration," said Michael Hirt, Chief Technology Officer of Credit Union 1. "I truly appreciated the opportunity to connect and share insights with our peers and Corelation leadership."

The first day of the forum featured a full agenda, starting with a keynote presentation by Gary Perez, President and CEO of USC Credit Union, discussing how the path to the CEO's office now often goes through the CTO's office. The general sessions were rounded out with discussions led by Jules Epstein-Hebert, Director of Membership Growth and Partnership at Inclusiv; Jeremy Neuharth, Co-Founder of Sycorr; and Paul Scheibal, Director, Data Architecture at Together Credit Union. Attendees also participated in open discussions and enjoyed lively vendor speed rounds, where modern solutions and services were showcased.

The second day participants were split into specialized tracks tailored specifically for CEOs and CTOs. The CEO track included insights from Wayne Oleksak, SwitchThink's SVP of Experience & Innovation, who led guests through the process of developing a customized digital strategy for their credit union, highlighting the essential role of a marketing team. Key takeaways focused on creating a digital credo, assessing the member journey, and designing a seamless, member-first experience.

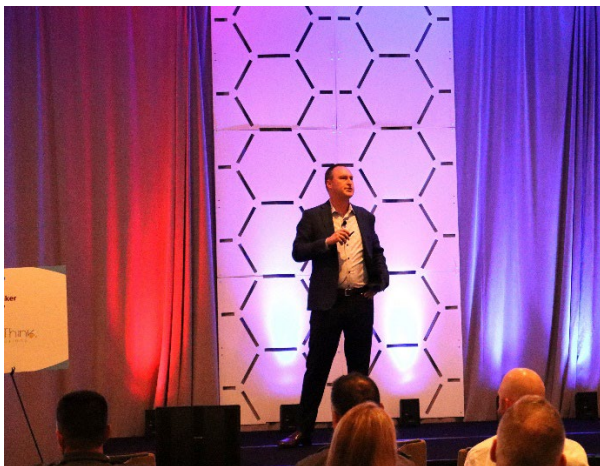
The CTO track contained a variety of technical presentations, including one from Dan Gonzalez, VP of Customer Relations at Federal Reserve Financial Services, who outlined how credit unions can leverage FedNow for instant payment solutions. An interactive panel also covered key aspects of Commercial Lending and Treasury Services, focusing on strategies to grow business deposits and manage loan portfolios. Panelists included Daryl Brubaker of Park View Federal Credit Union, Monte Drake of HAPO Community Credit Union, and Rachel Snyder from CU Business Group, who offered industry landscape and trends.

"At Corelation, we're proud to foster a community of like-minded credit unions, and this forum is focused on providing our clients valuable takeaways to bring back and better serve their members," shared Corelation President Rob Landis. "These direct interactions are vital—we're committed to listening and ensuring a consistent experience for credit unions as trusted business partners. We sincerely appreciate our credit union partners investing their time, coming with open minds, and embracing the opportunity to collaborate and network."

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