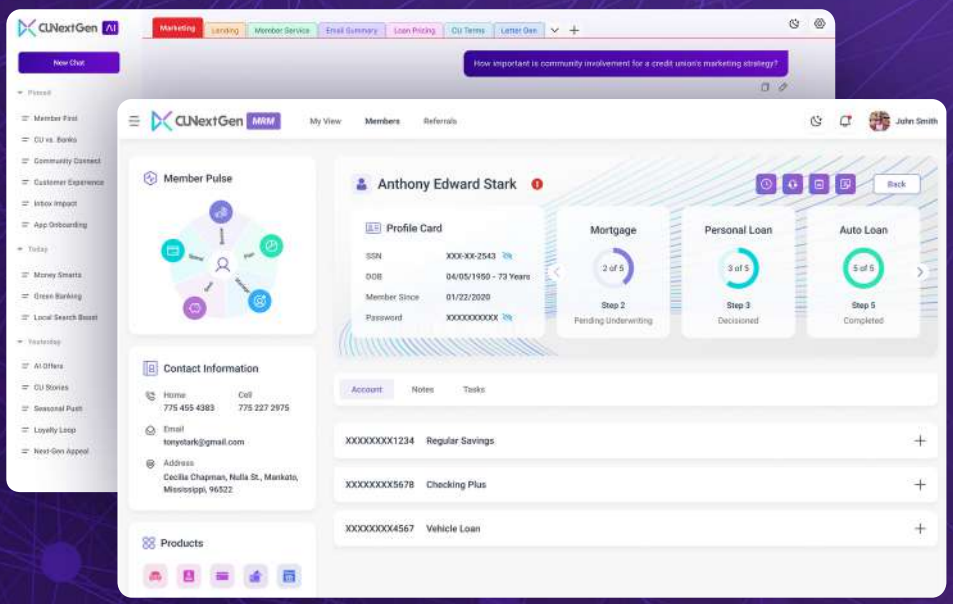
UNLOCK GROWTH, EFFICIENCY, AND INNOVATION AT

CU NEXTGEN ENGAGE

An Exclusive Event for Credit Union Leaders and Innovators

August 25-27, 2025
Cincinnati, Ohio



Scan the QR Code to claim your free tickets today!

Get ready for an exciting time filled with inspiring speakers, interactive workshops, and networking opportunities.

CUNextGen

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Executive Summary

CU NextGen Engage is more than a conference-it's a hands-on experience tailored for credit union executives, managers, and professionals who are ready to drive transformation. Across three immersive days, Engage will bring together industry leaders, innovation partners, and peers to collaborate, learn, and strategize around the future of credit union services.

Designed specifically for credit unions, this no-cost conference will empower attendees with actionable insights in three key areas: **Growth, Efficiency Management,** and **Expense & Bandwidth Management**. Whether you are seeking new technology strategies, operational improvements, or ways to better serve your members, Engage is where your next breakthrough begins.

Why Attend CU NextGen Engage?

What Makes CU Engage Different

Hear directly from forward-thinking credit unions about real-world strategies that drive success. Learn from case studies, data-backed results, and stories of innovation from top credit unions like Meritrust Credit Union, Altra Credit Union, First Florida Credit Union, CoVantage Credit Union, Michigan State University Credit Union, Space Coast Credit Union and more.

Key Topics and Sessions:

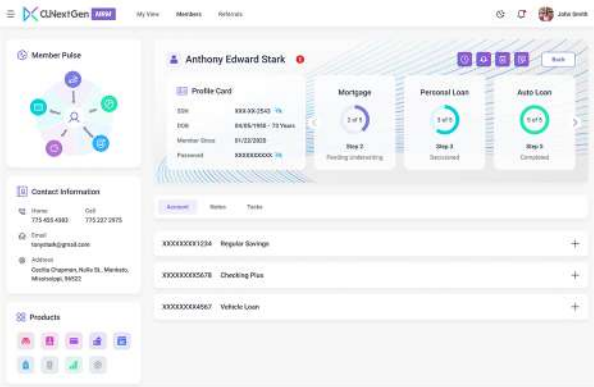
- Growing your membership and deepening member relationships
- Measure, Compare, Innovate: Taking charge of your digital presence across your credit union
- Leveraging Automation and AI for maximum operational efficiency.
- Unlocking opportunities to optimize staffing and resources.
- Maximizing Your Solutions: Strategies for changing software to meet member needs—without the pain of changing vendors

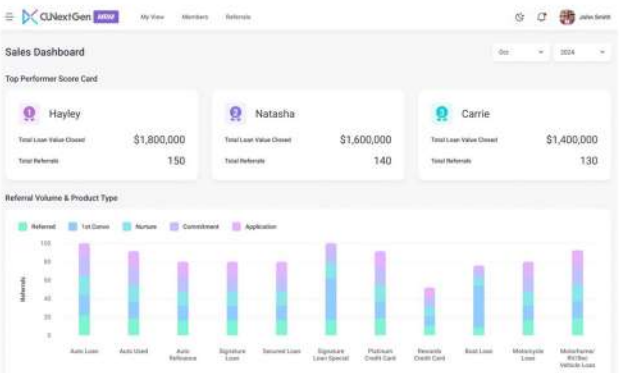
Experience the Future in the Innovation Lab Showcase

CU NextGen Engage offers a rare opportunity to step inside our Innovation Lab, where you will interact with forward-thinking solutions designed to redefine how credit unions engage with members and optimize

Featured Exhibits:

- **CRM for Member and Business Growth:** CRM for Member and Business Growth: Credit Union specific integrated CRM is a critical function for growth. CU Next Gen's Credit Union specific CRM platform has delivered exponential growth for many Credit Unions, making the member on boarding, engagement and growth a seamless integrated Member & Employee experience. At Engage, the Chief Growth Officer and Chief Financial Officer from Meritrust Credit Union will be presenting on how to build a successful and

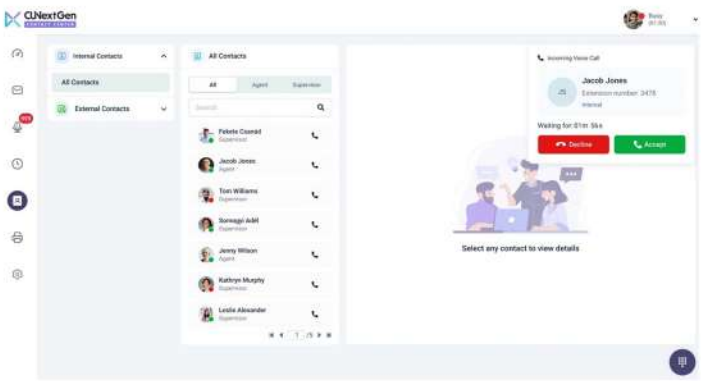




This showcase is designed to spark ideas and demonstrate how easily these innovations can be implemented in your credit union today.

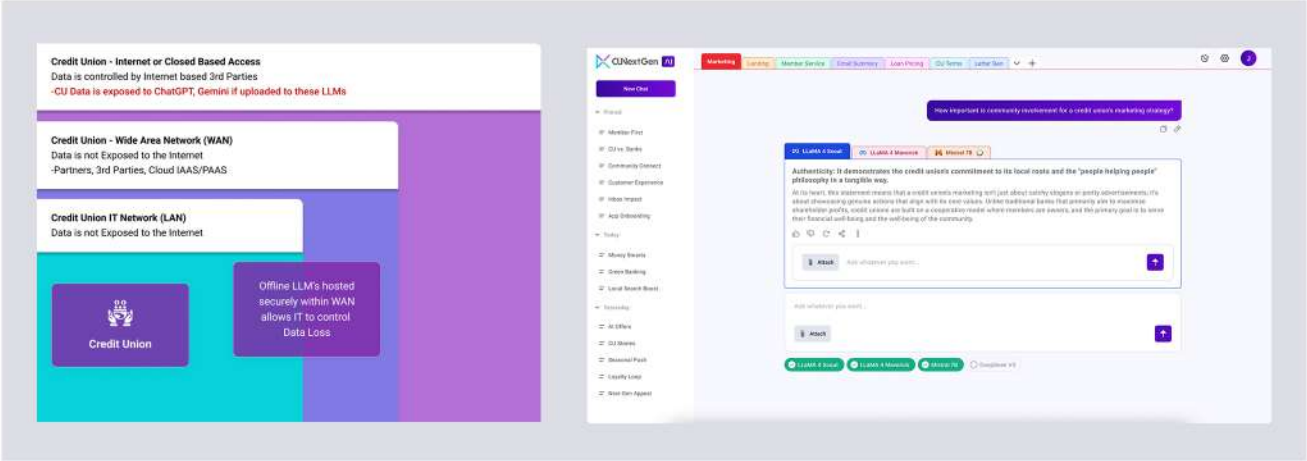
- **Branch of the Future:** See how credit unions can create a cost-effective, high-traffic physical space where members interact with staff virtually. Our interactive kiosks allow members to conduct nearly all branch activities—account services, lending, document signing, and more—with the only exception being large cash transactions. It is a smarter, leaner way to maintain a physical presence while reducing

- **Call Center of the Future:** Explore how to revolutionize your call center operations. Our demo highlights advanced tools and workflows that improve both member experience and staff efficiency—from AI-powered assistance and streamlined interfaces to data-driven insights that empower your frontline teams.



- **Phygital Kiosks:** Enabling a credit union to expand its member engagement options using these Kiosks. they can be displayed at Colleges and Universities, hotel lobbies, malls, gas stations, hospital lobbies and other locations enabling members to interact with the Credit Unions digitally but through a physical environment, providing credit union visibility while increasing member engagement.

- **Offline AI LLM's for Credit Unions:** Large language models like ChatGPT and Gemini really are a significant boost to productivity, but employees cannot use these public LLM's for anything related to member data or confidential Credit Union documents. Experience offline opensource LLM's like Llama and Gemma that can now be used.



Build Strategic Partnerships

Beyond learning, Engage is a hub for connections. Network with credit union executives, industry thought leaders, and technology vendors who understand your challenges and goals. Whether you are looking for inspiration, strategic alliances, or new vendors, Engage puts you face-to-face with the right people.

Featured Vendors and Partners: MDC, LodeStar, Alloy, and more.

Exclusive Experiences at a Premier Venue

Engage is designed to be as memorable as it is valuable:

- **Kickoff Happy Hour:** Network in a relaxed setting on August 25.
- **Full-Day Workshops and Speakers:** A robust agenda on August 26 focused on actionable growth strategies. This day is full of credit unions taking the stage and highlighting real solutions to credit union problems.
- **Wrap-Up Innovation Session:** A concise, high-value morning on August 27 to distill key takeaways, partake in breakout sessions and dig deeper.
- **Private Evening Event:** Enjoy a private experience at Cincinnati's Museum of Natural History—an opportunity to connect with industry peers accompanied by a happy hour and full dinner.

All sessions, events, and meals are complimentary to attendees.

Who Should Attend

- Executive Leadership (CEOs, CFOs, CIOs, CMOs)
- Operations and Innovation Managers
- IT, Marketing, Lending, and Member Experience Leaders
- Emerging Leaders looking to make a greater impact in their organizations

Whether you are steering enterprise-wide initiatives or managing key operational areas, Engage offers the tools and partnerships you need to succeed.

What You Will Leave With

- A fresh blueprint for credit union growth and digital transformation.
- Practical strategies to manage operational costs without sacrificing service quality.
- Trusted industry connections to support future initiatives.
- Firsthand exposure to next-generation tools from CU NextGen's Innovation Lab.
- A deeper understanding of how CU NextGen can help you achieve your goals faster and more effectively.

Secure Your Spot Today

Attendance is limited to ensure an interactive and high-value experience. **Registration is free** for credit unions.

Register Now

Join us at CU NextGen Engage and take the next step in your credit union's evolution.

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