

2011 Filene Research Institute Lectures, Presentations, and Planning Sessions

Explore current research and innovation findings with the dynamic and insightful executives and researchers from the Filene Research Institute. Our knowledgeable professionals are prepared to lecture on a variety of topics. Please see the biographies and topics below.



Mark Meyer, J.D.

As CEO of the Filene Research Institute, Mark inspires people to understand the opportunities for cooperative finance to transform communities and lives. His combination of passion and critical thinking show through in his research on innovation, consumer behavior, and the financial needs of young adults.

Mark's Presentation Topics

- *Wrestle with the "New."*
- *Leveraging "The Difference."*
- *Collaborator, Consolidator, or Contrarian.*
- *big.bright.minds. – a Filene Research & Innovation Briefing.*



George Hofheimer

George Hofheimer believes that the cooperative self-help model can (and should) be more efficient, effective, proactive, and innovative. As the chief research officer at the Filene Research Institute, George works hand-in-hand with the world's academic community to prove it.

George's Presentation Topics

- *Credit Union Differentiation.*
- *Member Experience and Share of Wallet.*
- *Sustainability Strategies.*
- *Filene Research Briefs.*



Denise Gabel

As chief innovation officer, Denise moves mountains. She has a high-energy style and a natural ability to coax people and ideas forward. An in-demand public speaker, Denise has been interviewed widely, from *National Public Radio* to the *Wall Street Journal*.

Denise's Presentation Topics

- *Leveraging Consumer Trends to Grow satisfaction.*
- *Are We Managing Innovation or Managing for Innovation?*
- *Credit Union Innovation: Why Bother?*
- *Filene Innovation Briefing: Inside the Innovation Lab.*

**Full bios, topic descriptions, and request form at filene.org/talent
 Contact Filene at (608) 231-8550 or research@filene.org**



Ben Rogers

For Ben Rogers, ‘correct’ is important but ‘useful is paramount. With that lens, Ben manages and edits a large pipeline of economic, market, and policy research related to the consumer finance industry. As the Filene Research Institute’s research director he speaks widely on credit union topics and has authored nearly twenty Filene reports, including much of the Institute’s young adult research.

Ben’s Presentation Topics

- *Credit Union Governance.*
- *Member Experience and Share of Wallet.*
- *Trends in Consumer-Facing Technology.*
- *Professional Development Research.*
- *Filene Research Briefs.*



Matt Davis

Matt believes cooperation, collaboration, resourcefulness, and a little bit of creativity are at the heart of making the mutual self-help model of credit unions work. Matt is a credit union Swiss Army knife (with a background in public relations and marketing). At the Filene Research Institute, Matt helps credit unions put i³ ideas into action and develop an innovation competency.

Matt’s Presentation Topics

- *The Magic of “Doing.”*
- *i³ Ideas Pipeline.*
- *Bringing the Innovation Competency to your Credit Union.*
- *Trends in Financial Services Innovation.s*
- *How Credit Unions Can Leverage the Power of Social Media...on Almost Any Budget.*

Filene Advisor



Brent Dixon

When Brent Dixon was a kid, he wanted to be a tractor. That didn't work out, and now he's a designer, speaker, and advisor specializing in young adult issues. The Filene Research Institute and Brent have worked with more than 25 state credit union leagues, a dozen individual credit unions and credit union trade association in the United States and Canada to distill Filene’s extensive library of young adult research into successful outreach initiatives.

Brent’s Presentation Topics

- *Digital Culture & Strategy.*
- *Attracting & Retaining Younger Members.*
- *Design Thinking: A Human Centered Approach to Innovation.*
- *Designing Interaction: Maximizing Your Website's User Experience.*

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Filene Research Fellows



Jim Wilcox

Jim is a nationally-recognized authority on credit unions and banking, on housing and mortgage markets, on monetary policy, and on interest rates. Jim has served as an economist at the Federal Reserve Board, at the President's Council of Economic Advisers, and at the Comptroller of the Currency.

A professor at the Haas School of Business at UC Berkeley, Jim weaves his macroeconomic, housing, financial market, and regulatory insights into his analysis of and forecasts for credit unions and the economy in which they operate.

Jim's Presentation Topics

- *The Outlook for the Economy: Interest Rates, Growth Rates, Unemployment Rates, and Inflation Rates.*
- *The Outlook for the Economy and Its Implications for Credit Unions, This Year and Next.*
- *Size Matters: Credit Union Costs, Growth, and Consolidation.*
- *What Do Mergers Do for Credit Union Costs and Efficiencies?*
- *Deficits, Debt, Interest Rates, and the Public Sector: What's Ahead?*

Presentation fees & booking

- Presentation honorarium ranges from \$5,000 - \$9,000 + expenses, depending on topic, travel, numbers of presentations, and other circumstances.
- Please complete request form at filene.org/talent for booking.



Annamaria Lusardi

Annamaria is the Director of the Financial Literacy Center, a joint Center of Rand, Dartmouth College, and the Wharton School created with the support of the Social Security Administration. She has taught at Dartmouth College, Princeton University, the University of Chicago Public Policy School, the University of Chicago Booth School of Business, and Columbia Business School.

In 2008 she was a visiting scholar at Harvard Business School. She is currently at the George Washington School of Business. She holds a Ph.D. degree in economics from Princeton University.

Annamaria's Presentation Topics

- *Household financial decisions: The importance of financial literacy.*
- *Explaining why so many households do not save.*
- *Americans' financial capability.*
- *How to improve the effectiveness of financial education programs.*
- *Five steps to planning success.*

Presentation fees & booking

- Presentation honorarium is \$5,000 per day + expenses.
- Booking at annamaria.lusardi@dartmouth.edu, (603) 208-7885, or Audrey Brown, audrey.brown@dartmouth.edu, (603) 646-2202.

Filene Research Institute Lectures, Presentations, and Planning Sessions*

There are two general honorarium categories (Filene member and non-member) for Filene talent lectures, presentations, and planning sessions:

	Filene Member Discounted Rates *	Non-Filene Member Rates*
Mark Meyer	\$2,500	\$5,000
George Hofheimer Denise Gabel Ben Rogers Matt Davis	\$2,000	\$4,000
Filene Advisors: Brent Dixon	\$3,500	\$6,000
All Webinars (non-Fellows)	\$1,500	\$3,000
Filene Research Fellows: Jim Wilcox Annamaria Lusardi	Please see their individual listings	

* **Notes on rates:**

- 1) Filene member discounted rates are available for all Leadership Circle level members and above.
- 2) Add reimbursement for coach airfare, hotel (if not included in room block), and \$250 for incidentals (no receipts provided).
- 3) Rate includes two days out of Filene office (add \$1,000 for each additional day out of the office).
- 4) Rate may be adjusted up or down based on talent performance.
- 5) On occasion, Filene will offer custom honorariums based on circumstances or event.
- 6) Credit union or credit union league planning session rates depend on content, prep work, donor status, and number of days out of the office.
- 7) Webinars – rates assume there is no travel involved and the lecture/presentation is 120 minutes or less.

Filene talent will provide Think and Do pads in lieu of providing presentations ahead of time. Filene Think and Do pads are small pads of paper for attendees to take notes on, which also includes a guest pass for free Filene research/innovation publication downloading.

Of course our intent is to be reasonable and create a win-win. Please use the request form found on our website at filene.org/talent to inform us of your interest.

Thank you for considering the Filene Research Institute!

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