GROW IMPACT

with Filene

2015 PRESENTATIONS
MEMBER EXPERIENCE

Member Experience: The Multi-Channel Challenge
Member Experience and Share of Wallet
Credit Union Differentiation
Member-Friendly Noninterest Income
Balancing Member Service with Organizational Efficiency
Best Practices in Consumer Lending

RESEARCH INSIGHTS

101 Credit Union Insights from Filene
Adding Value: Research Insights on Credit Union Leadership
Filene 25: Insights from the Archives Illuminating the Path Ahead
Filene Research Briefs
New! Big Data and Machine Learning

YOUNG ADULTS

Attracting and Engaging the Young Adult Market
Recruiting and Retaining the Next Generation of Credit Union Leaders
The Cooperative Trust: Engaging Young Credit Union Employees
Financial Literacy, Credit Unions, and Under 35s

MARKETING & SOCIAL MEDIA

Social Media: Where Do Credit Unions Stack Up?
Social Media: Driving Business Results Through Engagement
New! Engage and Educate via the Power of Social

WANT A CUSTOMIZED PRESENTATION?
JUST ASK.
**LEADERSHIP**

Leadership and Value: Opportunities in Credit Union Board Governance
CEO Personality, Organizational Culture, and Getting Results
Board Governance: Successfully Leading Credit Unions into the Future
Mission-Based Leadership

**New!** Thriving Small Credit Unions
**New!** Breaking Free: Creativity Techniques to Move from Stuck to Success
**New!** Leading Credit Unions: A Woman’s Perspective

**IMPACT**

Impact: Solutions for Credit Union Success
Enhancing Online Sales Capabilities Using Behavioral Economics
Credit Unions and International Cooperation
Channel Delivery for Tomorrow
The Gamification of Financial Services
Launching Ideas That Establish a Sales and Service Culture

**New!** Financial Sustainability: Increase Wallet Share and Noninterest Income

**NEW FOR 2015:**
**SMALL CREDIT UNION VIRTUAL STRATEGIC PLANNING**

**INNOVATION**

Demystifying Innovation
Innovation Immersion
Execution: From Innovation to Implementation
i³ Ideas Pipeline
Trends in Financial Services Innovation

**New!** The Intersection of Innovation and the Underserved
**New!** Accessible Financial Services: 5 Products for the LMI consumer
**New!** Unlocking the Innovation Vault: 10 years of i³

ANY OF OUR FILENE PROFESSIONAL SPEAKERS CAN PRESENT ANY OF THESE TOPICS.
WE’LL HELP YOU SELECT THE BEST PRESENTER FOR YOUR EVENT.
Cynthia Campbell
Impact + Labs Director
Cynthia leads Filene’s accessible financial services incubator and works with credit unions to implement programs that positively impact their members and organization. She brings a decade of credit union experience to Filene.

Mark Meyer
CEO
Mark inspires people to understand the opportunities for cooperative finance to transform communities and lives. As one of North America’s top cooperative finance thinkers, his critical thinking shows through in his approaches to innovation and research on consumer behavior.

Mollie Bell
Chief Engagement Officer
Mollie develops and fosters relationships and communities while growing awareness of Filene’s research and innovation in the marketplace. Mollie helps Filene members and other contributors maximize their engagement with the organization by connecting ideas to issues.

George Hofheimer
Chief Knowledge Officer
George arms credit unions with the practical, yet creative ideas they need to compete on their members’ behalf. He manages an extensive pipeline of research projects and innovation programs, including the prestigious i3 group and accessible financial services incubator.

Tansley Stearns
Chief Impact Officer
Tansley takes research and innovation and turns them into practical applications for credit unions. With over 17 years of leadership experience, she knows how to turn ideas into business results.

Cynthia Campbell
Impact + Labs Director
Cynthia leads Filene’s accessible financial services incubator and works with credit unions to implement programs that positively impact their members and organization. She brings a decade of credit union experience to Filene.
Andrew Downin  
Innovation Director

Andrew leads Filene’s prestigious i3 (Ideas, Innovation, Implementation) program and subsequent testing of its financial product, service, and business model ideas. He is an i3 alumni and previously served as manager of product development at SchoolsFirst Federal Credit Union.

Chad Helminak  
Impact Director

Chad takes the best of Filene’s research and innovation and works with credit unions to implement key findings that will impact their members and organization in positive and meaningful ways. Chad brings nearly 10 years of credit union experience to Filene.

Ben Rogers  
Research Director

Ben wrestles economic, consumer behavior, management, and policy questions through Filene’s research pipeline. He has authored nearly 20 Filene reports on topics as divergent as young adult financial behavior, consumer lending, noninterest income, and cooperative management.

James Marshall  
Leader of The Cooperative Trust

James leads The Cooperative Trust, a grassroots community of young people who work in credit unions and cooperatives founded by Filene. He brings sustainability and longevity to the Trust as it moves into the next stages of development.

i3 Alumni

Filene i3 (Ideas, Innovation, Implementation) is a learning program for credit union executives. Our large network of i3 alumni present on their experiences in bringing financial innovation to credit unions as well as the financial products, services, and models they created and tested at their credit unions.
Annamaria Lusardi
Filene Research Fellow
Annamaria is the Academic Director of the Global Center for Financial Literacy at the George Washington School of Business, and director of the Financial Literacy Center. Her research focuses on financial education, planning, and management.

Robert Hoel
Filene Advisor
Bob blends research with practical experience. He has written and contributed to numerous Filene research projects, including reports on governance, consumer trends and preferences, characteristics of thriving credit unions, and alternative capital.

Dennis Campbell
Filene Research Fellow
Dennis is a Professor of Business Administration at Harvard Business School. His research, teaching, and case writing focus on designing and integrating organizational structures, performance measurement, and incentive systems to foster empowerment, mitigate risk, and enable organizational learning and long-term value creation.

Jennifer Kuhn
Filene Advisor
Jennifer facilitates planning sessions with executive leadership and boards. With a passion for cooperatives and experience in human resources, she develops interactive, action-oriented sessions.

Christopher C. Nicholls
Filene Research Fellow
Chris holds the Stephen Dattels Chair in Corporate Finance Law at Western University’s Faculty of Law. His research focuses on the regulation of financial institutions and instruments, corporate finance, securities regulation and mergers and acquisitions.
Rob Rubin  
Filene Advisor  
Rob is a managing director at digital strategy research firm Novarica and leads its banking practice. Prior to that, he founded FindABetterBank.com, the largest panel of bank shoppers in the United States.

Hope Schau  
Filene Research Fellow  
Hope is the Gary M. Munsinger Chair in Entrepreneurship and Innovation at University of Arizona’s Eller College of Management. Her research explores technology and marketplace relationships, branding, consumption practices, and collaborative value creation.

Eldar Shafir  
Filene Research Fellow  
Eldar is a Professor of Psychology and Public Affairs at Princeton University. His focus areas include reasoning, judgment, and decision-making, and issues related to behavioral economics. A central theme Eldar explores is the tension between normative assumptions and behavioral findings.

Jim Wilcox  
Filene Advisor  
Jim is a Professor at the University of California, Berkeley’s Haas School of Business, where he weaves his macroeconomic, housing, financial market, and regulatory insights into analysis of and forecasts for credit unions and the economy in which they operate.

SEE A COMPLETE LIST OF AVAILABLE TOPICS AT FILENE.ORG.
HOT TOPICS. GREAT INSIGHTS. EDGE-OF-YOUR-SEAT SPEAKERS.

We promise fun, fast-paced sessions from our experts that cover the latest research, address specific challenges, and result in clear next steps.

TO BOOK A PRESENTATION, contact Filene at 608.661.3740 or info@filene.org. Find full bios, topic descriptions, and request forms at filene.org.

Rates for Filene Speakers*

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<th>SPEAKER</th>
<th>FILENE MEMBER RATE</th>
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<td>All webinars and planning sessions</td>
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Rates for Filene Research Fellows and Advisors

Dennis Campbell ...................... pricing upon request
Robert Hoel ........................... $2,500 to $4,500 per day plus expenses
Jennifer Kuhn ......................... $2,000 to $4,000 plus expenses
Annamaria Lusardi ..................... $5,000 per day plus expenses
Christopher Nicholls .................. $5,000 per day plus expenses
Rob Rubin ............................. $5,000 per day plus expenses
Hope Schau ............................ $5,000 per day plus expenses
Eldar Shafir ........................... $5,000 to $10,000 plus expenses
Jim Wilcox ............................ $5,000 to $9,000 plus expenses

*NOTES ON RATES:
1. Filene member discounted rates are available to all Filene members.
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. All Benefactors receive at least one presentation with waived speaker fee. Travel fees still apply.
5. Custom honorariums may be provided based on circumstances or event.
6. Webinars: Rates to be determined by amount of customization and length. Range is $1,500 to $3,000.
7. Planning Sessions: Pricing depends on membership status. Range is $5,000 to $20,000.