

FEATURED SPEAKER



RICHARD GOSE **SENIOR VICE PRESIDENT, POLITICAL AFFAIRS, CUNA**

Over the past 20 years, Richard Gose has worked as a political affairs and trade association professional. He has combined campaign politics and grassroots activation with an understanding of the legislative

process and communication to advance political operations for major trade associations including the National Association of Home Builders (NAHB), the American Insurance Association (AIA), and currently, the Credit Union National Association (CUNA).

At CUNA, Gose leverages the partnership with state leagues to develop programs and services to help credit unions and their members improve legislative and political standings by enhancing their political muscle.

Among the innovations Gose has pioneered include “Hike the Hill,” a program that brings more than 1,500 credit union representatives to Washington each year to meet with members of Congress and keep their issues at the forefront of Congressional consideration. Other initiatives include Project Zip Code, which has identified 74 million credit union members in various legislative districts; Advocacy Training, an advocacy program that teaches credit union advocates how to communicate with media and lawmakers; improving the effectiveness of the Credit Union Legislative Action Council (CULAC), which serves as the \$4 million Political Action Committee for credit unions and other political involvement activities.

Gose holds a BA in History and Political Science from the University of Tennessee. He and his wife, Jackie, have four children. They spend time playing and coaching sports and updating their 19th Century farmhouse in Vienna, Virginia.

ABOUT RKL'S CREDIT UNION SEMINAR

As part of our commitment to the credit union industry, RKL has been hosting an Annual Credit Union Seminar for over a decade. Our goal has always been to feature expert speakers that provide timely information and lively discussions about the challenges and opportunities facing America's credit unions. Part of this tradition includes the appearance of United States historical figures as added educational entertainment. Because we have credit union clients throughout the Mid-Atlantic region, we host this event at a central location for all who wish to join us to gain valuable insights as well as network with other individuals within the industry.



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1330 Broadcasting Road
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REGISTER EARLY!

CREDIT UNION SEMINAR

JOIN US ON NOVEMBER 19, 2013

Discuss challenges and opportunities facing America's credit unions with top professionals from the credit union industry.



Tuesday, November 19, 2013
RiverCrest Golf Club & Preserve

100 Golf Club Drive
Phoenixville, PA 19460

Directions From PA Turnpike:

Take PA Turnpike to Exit #326 Valley Forge. Follow signs for 422 West. Take 422 West to the Collegeville Exit. Make turn onto Route 29 South. Travel over Black Rock Road. RiverCrest main entrance 1/4 mile on right. Follow RiverCrest Drive past pond and make right into clubhouse parking lot.

RKL's 2013 **CREDIT UNION SEMINAR**



Tuesday, November 19, 2013

RiverCrest Golf Club & Preserve

Phoenixville, PA

Featured Presenters:

LEONARD N. CHANIN
Partner, Morrison & Foerster

RICHARD GOSE
Sr. VP of Political Affairs, CUNA

LEE WETHERINGTON, AAP
Director of Strategic Insight, ProfitStars®

Special Appearance by
“Thomas Jefferson” & “Alexander Hamilton”



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PRESENTERS



LEONARD CHANIN PARTNER, MORRISON & FOERSTER

A recognized expert in the field of consumer financial protection with extensive experience in regulation and supervision of the myriad statutes affecting retail banking, Leonard Chanin counsels financial institutions on consumer financial services law issues. Chanin regularly advises clients on issues relating to the Truth in Lending Act, Electronic Fund Transfer Act, Fair Credit Reporting Act, Truth in Savings Act and Equal Credit Opportunity Act.

Before rejoining Morrison & Foerster, Chanin served as the Assistant Director of the Office of Regulations of the Consumer Financial Protection Bureau (CFPB). There, he headed the agency’s rulemaking team by supervising nearly 40 lawyers responsible for promulgating rules and regulations implementing consumer financial protection legislation. He also provided legal opinions to Bureau supervisory and enforcement offices on federal consumer financial protection laws.

Prior to joining the CFPB, Chanin served as Deputy Director of the Division of Consumer and Community Affairs at the Federal Reserve Board. During his tenure at the Federal Reserve Board, Mr. Chanin provided legal opinions and policy recommendations to the Board and the Division on federal consumer financial services laws, negotiated rules and policies with the other federal banking agencies and provided legal views on enforcement actions against state member banks. From 1999-2005, Chanin was Of Counsel in Morrison & Foerster’s Financial Services group in Washington, D.C., where he counseled clients on federal consumer financial services laws.

While attending Washington University School of Law in St. Louis, Chanin was on the board of the Washington University Law Review. Chanin is a fellow of the American College of Consumer Financial Services Lawyers.



LEE WETHERINGTON, AAP DIRECTOR OF STRATEGIC INSIGHT, PROFITSTARS®

Lee Wetherington, is Director of Strategic Insight for ProfitStars®, a division of Jack Henry & Associates® (JKHY: NASDAQ). Lee directs the development of actionable insight and strategy for the financial services industry. To this end, he creates programs, presentations, and articles designed to orient and educate financial executives on the trends and implications of new technologies. He routinely delivers keynotes nationwide focusing upon opportunities and challenges in payments and the online/mobile/social channels, and he is widely renowned for his unique style and dynamic delivery.

Lee has delivered over 300 keynotes for state and national trade groups, including the Texas Credit Union League, Mountain West Credit Union Association, Symitar, American Institute of CPAs (AICPA), and the National Automated Clearinghouse Association (NACHA). He also serves as the Technology Faculty Chair for the Southwest CUNA Management School. Lee’s articles and commentary have been published widely across the financial services industry.

Lee received bachelor degrees in Economics and English from Duke University in 1990, and in 1993, he completed graduate studies at Emory University. In 1995, he earned the distinguished Accredited ACH Professional (AAP) certification from the National Automated Clearing House Association (NACHA).



THOMAS JEFFERSON & ALEXANDER HAMILTON AS PORTRAYED BY STEVEN EDENBO & IAN ROSE

Steve Edenbo has entertained and inspired audiences of all ages since 1999. He has researched Jefferson as a resident fellow at Monticello's International Center for Jefferson Studies in Charlottesville, VA. He appears regularly at such venues as The National Archives in Washington, D.C., and at Independence Hall and the Declaration House in Independence National Historical Park, Philadelphia. Steve has been featured on the History Channel and has matched wits with Stephen Colbert on Comedy Central's "The Colbert Report." He has shared Jefferson's life and legacy at the Jefferson Memorial in Washington, D.C., across America and in England.

Ian Rose has been representing historical figures since 1994. For the past 9 years Ian has been playing Alexander Hamilton at a variety of different venues across the United States. Ian’s appearances as Hamilton have seen him at The Richard Nixon Presidential Library and Museum in California, arguing Constitutional cases before The People’s Court Judge Marilyn Millian in New York City, as well as in presentations for the State Department, the Newseum and before the actual Constitution at the National Archives in Washington, D.C. Ian has appeared as Col. Hamilton in the documentaries; First Faith, Rediscovering Alexander Hamilton, and Fractured Union for Mount Vernon. Ian is a graduate of Western Illinois University and a veteran of many Shakespeare Festivals.

SCHEDULE

8:00 - 9:00 am • REGISTRATION, BREAKFAST & INTRODUCTION

9:00 - 10:40 am • THE MOBILE WARS: HOW CREDIT UNIONS WIN
LEE WETHERINGTON As many credit unions grapple with the transition from mobile banking to mobile payments, few factor in the larger context of mobile commerce. Regardless of which form of mobile payments prevails—NFC, Cloud, Barcode, Hybrid—there is broad agreement on the convergence of banking, shopping, payments, geo-location and personal financial management tools (PFM). Almost half of consumers already use their mobile phones to shop for the best price, and a third want deals offered in real time based on where they are. Consumers don’t need another way to pay, but most will avail themselves of easier, faster, better ways to shop, save and spend. The good news is that credit unions are central to this pursuit and are already armed to remain relevant. Join Lee for a no-nonsense review of the mobile wars, where we are, what’s ahead and how credit unions can leverage their unique data to win.

10:40 - 11:00 am • BREAK

11:00 am - 12:00 pm • JEFFERSON VS. HAMILTON

Thomas Jefferson “descends into the pit like a gladiator,” as he described his battles with Secretary of the Treasury Alexander Hamilton. The sparks fly and the Constitution rumbles as these two titans struggle to control the future of the new nation. Expect the Q&A to continue the debate, fueled by their disagreement about a direction for America.

12:00 - 1:00 pm • LUNCHEON

1:00 - 2:15 pm • HOT TOPICS IN THE NCUA & CREDIT UNIONS

LEONARD CHANIN Amidst a constantly changing regulatory environment, Leonard will present on current and upcoming issues including what community institutions can expect from the Consumer Financial Protection Bureau.

2:15 - 3:30 pm • CUNA ADVOCACY UPDATE

RICHARD GOSE As Senior Vice President, Political Affairs, Richard will provide insights into the current political landscape for credit unions and CUNA’s anticipated advocacy agenda and goals for 2014 and beyond.

focused on... CREDIT UNIONS

RKL is a leading accounting, tax and consulting firm in Pennsylvania with four offices located in Reading, Lancaster, York and Harrisburg. Our growth and success is based on our commitment to quality and timely service, our range of services and our depth of experience. Our team of knowledgeable and experienced professionals provides our clients with fresh thinking and solid solutions.

At RKL, we take great pride in our service and commitment to the credit union industry. Our credit union services group actively participates in industry-related organizations, such as CUNA and CUES. We make it a priority to be aware of industry trends and concerns so we can offer you the best possible service.

RKL’s accounting services include much more than certification of your financial statements. Our services include a management letter, which addresses timely and pertinent issues facing your credit union. Other services include:

- BSA compliance reviews
- ACH compliance reviews
- Quarterly supervisory committee assistance
- IT reviews
- Regulatory compliance reviews
- Business valuations - mergers

JAMES W. PRUZINSKY, CPA

Jim is a partner in RKL’s Audit Services Group. He has over 30 years of public accounting experience and specializes in credit union, construction and manufacturing industries.

STEVEN C. WEIDNER, CPA

Steve is a partner in RKL’s Audit Services Group. He has over 25 years of public accounting experience and specializes in accounting and consulting services for the firm’s credit union and manufacturing practices.

FRANCIS J. DONNELLY, CPA

Frank is a partner in RKL’s Audit Services Group. He specializes in accounting and consulting for the credit union industry and employee benefit plans.



RKL’s CREDIT UNION SEMINAR

RiverCrest Golf Club & Preserve
100 Golf Club Drive, Phoenixville, PA 19460

REGISTRATION FORM

Register by November 1st. Seating is limited. Dress is business casual.

Discounts are available for multiple registrants from the same credit union:

- one attendee: \$225 per person
- two attendees: \$200 per person
- three attendees: \$175 per person
- four attendees: \$150 per person
- five or more attendees: \$125 per person

This seminar qualifies
for 5 CPE credits!

Registrant’s Name	Title
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____

\$ _____	x	_____	= \$ _____
Registration Fee		Total Registrants	TOTAL ENCLOSED

Make checks payable to: Reinsel Kuntz Leshner LLP.

Check # _____ Enclosed (Pre-payment is required to secure your reservation.)

Credit Union Name _____

Address _____

City _____ State _____ Zip _____

Phone () _____ Fax () _____

E-mail: _____
Please provide your email address for registration confirmation.

Mail this form with payment by November 1st to:
Reinsel Kuntz Leshner LLP • 1330 Broadcasting Road • P.O. Box 7008 • Wyomissing, PA 19610

Any questions may be directed to:
James W. Pruzinsky, 610.376.1595 or e-mail: jpruzinsky@RKLcpa.com