

CUMA CONFERENCE 2007

1. Conference Schedule! Ready or Not!



SUNDAY, SEPTEMBER 16TH

- 9:00 am - Noon Tee - Times** CUMA and CGI Golf Tournament - *Sponsored by CGI*
Not included in Registration fee. See separate golf registration form attached for details.
- 3:00 pm - 6:00 pm** Registration
- 6:00 pm**..... Welcome Reception and BBQ for all participants and guests. - *Sponsored by Open Solutions*
- 8:00 pm**..... Hospitality Suite (room to be announced) - *Sponsored by Johnson Inc.*

MONDAY, SEPTEMBER 17TH

- 7:30 am - 6:00 pm**.....Registration
- 7:30 am** Continental Breakfast - *Sponsored by CRI Canada*
- 8:30 am**.....Opening Remarks
- 8:45 am**.....Plenary Keynote Speakers - **Gayle Hallgren-Rezac and Judy Thomson** -
"The Power of Positive Networking" - *Sponsored by Desjardins*
- 10:00 am**.....Nutrition Break - *Sponsored by Gunnebo*
- 10:30 am**.....Plenary Interactive Workshop - **with Howard Bogach (CEO CUCO) and Jack Vanderkooy (CEO DUCA Financial)** "2012...Perspectives on the Future of the Financial Services Industry" - *Sponsored by First Financial Building Corporation*
- 11:30 am**.....CUMA AGM and Luncheon - *Sponsored by Concentra Financial*
- 1:30 pm**.....Executive Breakout Sessions - First Round
- #1 - "Technology and The Future of the Credit Union System" - **Michael Furdyk** - *Sponsored by Selient*
 - #2 - "Building Connected Leaders" - **Gayle Hallgren-Rezac and Judy Thomson** - *Sponsored by Level Five*
 - #3 - "Financial Services - Key Trends and Issues" Strategic Solutions Group - *Sponsored by CUIS*
 - #4 - "Pandemic Planning - Don't be Scared be Prepared!" - **Doug Mellor** - *SaskCentral*
- *Sponsored by Perception Interactive Media*
- 2:45 pm**.....Nutrition Break - *Sponsored by Gunnebo*
- 3:15 pm**.....Executive Breakout Sessions - Second Round
- #1 - "Technology and The Future of the Credit Union System" - **Michael Furdyk** - *Sponsored by Interprise*
 - #2 - "Building Connected Leaders" - **Gayle Hallgren-Rezac and Judy Thomson** - *Sponsored by CUETS*
 - #3 - "Financial Services - Key Trends and Issues" Strategic Solutions Group - *Sponsored by CUIS*
 - #4 - "Pandemic Planning - Don't be Scared be Prepared!" - **Doug Mellor** - *SaskCentral* - *Sponsored by Diebold*
- 6:30 pm**.....Gala Reception - *Sponsored by CUSOURCE*
- 7:30 pm - 9:30 pm**.....Gala Banquet and Awards Dinner
- 9:30 pm - 12 am**Hospitality Suite - *Sponsored by SaskCentral*

TUESDAY, SEPTEMBER 18TH

- 7:30 am**.....Continental Breakfast - *Sponsored by CRM Canada*
- 8:30 am**.....Plenary Interactive Workshop - "Crime in Business and the Business of Crime" - **Chris Mathers** -
and "Insurance Claims and Their Future Impact" - **Don Maisonville and Bill Ballentine** - *Sponsored by Strategic Information Technology*
- 10:45 am** Nutrition Break - *Sponsored by Gunnebo*
- 11:15 am**.....Plenary Keynote Speaker - **Leonard Brody** - "The Year Ahead for Canada, Innovation and Technology & Why You Should Start Caring" - *Sponsored by Roler Data*
- 12:30 pm**.....Closing Comments and Announcements
- 12:45 pm**.....Pick up your "Lunch on the Run" and have a safe journey home!

2. Conference Registration

Conference fee for delegates also includes Sunday Welcome Reception, Nutrition Breaks, Continental Breakfasts, Lunches, Monday Evening Reception Gala and Awards Banquet. All prices include GST. Companion Fee includes all meals, breaks and receptions.

	EARLY BIRD	AFTER JULY 31ST, 2007	COMPANION FEE
	<i>(Incl. GST)</i>	<i>(Incl. GST)</i>	<i>(Incl. GST)</i>
CUMA Member	\$ 895	\$ 995	\$200
Non Member	\$ 1,060	\$ 1,160	\$200
Multiple Registration**	\$ 845	\$ 945	\$200

** Multiple Registration: applies to the third & additional registrants of credit unions registering three (3) or more participants.

All Early Bird registrations will be entered into a draw for a CASH award!!

Thanks to our Early Bird sponsor Signature Group.



Please note vendor sponsors will be provided with delegate contact information.

REGISTRANT'S NAME Mr./Ms _____ Title _____

COMPANION GUEST Mr./Ms _____ TOTAL FEE Submitted (see above rate structure) _____

Credit Union Name: _____ No. of C.U. Members: _____ Asset Size: _____

Address _____

Bus. Telephone: _____ Fax: _____ E - Mail Address: _____

SELECT TWO ONLY

Please indicate your choices in order of priority (1 to 4), 1 being your highest priority, 2 being your next highest and so on, for the following Executive Break-Out Sessions on Monday the 17th. You will be registered for two sessions based on your selections here on a first come first serve basis.

Technology and The Future of the Credit Union System

Financial Services - Key Trends and Issues

Building Connected Leaders

Pandemic Planning - Don't be Scared be Prepared!

CANCELLATIONS

Refunds will be given for cancellations received by the Administrative Assistant in writing no later than September 1st. A fee of \$100.00 will be applied to ALL cancellations. Refunds for eligible cancellations will be processed following the conference. We regret we cannot give refunds after September 1st; however delegate substitution will be permitted with the appropriate adjustment in fees.

HOW TO REGISTER!

1. Mail OR Fax your completed registration and the separate registration form for the golf tournament to:

CUMA
C/O QuintEssential Credit Union
293 Sidney Street, Belleville, Ontario K8P 3Z4
(or via cuco courier)
Or fax the forms to 613-966-8909

INDICATE YOUR METHOD OF PAYMENT:

Cheque MasterCard

MasterCard No. _____ Expiry Date _____

Name appearing on card _____

Authorized Signature _____

3. Room Reservation *NOTTAWASAGA INN RESORT*

LAST NAME _____ FIRST NAME _____
 ADDRESS _____
 CITY _____ PROV. _____ POSTAL CODE _____
 TELEPHONE (daytime) _____ FAX OR EMAIL _____
 ARRIVAL DATE _____ DEPARTURE DATE _____

Smoking Non-Smoking Single Occupancy Double Occupancy Name of Room Sharer: _____
***Please note: The entire hotel is Non-Smoking*.** If you require a balcony for smoking purposes, please indicate smoking above.

ROOM RATES

For Saturday September 15, 2007 (Includes Sunday Breakfast) • \$138.95 + tax - Single Occupancy OR \$74.95 + tax per person - Double Occupancy
 For Sunday, Monday, Tuesday - Sept 16, 17, 18 (no meals) • \$128.00 per room, per night or \$64.00 + tax per person Double Occupancy

For full details regarding guest Rooms and other Resort services and amenities go to: www.nottawasagaresort.com/generalinfo.htm
Note: All Preferences are based on availability and are not guaranteed.

CREDIT CARD INFORMATION: Card Number _____
 Expiration Date _____
CARD TYPE: Master Card Visa Diners Club/EnRoute Discover

Note: If you do not wish to guarantee your room with a credit card, please contact the hotel directly.

CONFIRMATION METHOD: Email _____
 Fax _____
 Telephone _____

OTHER REQUESTS OR COMMENTS _____

Individual rooms cancelled within 30 days of arrival date will be charged the bedroom rate for each night cancelled (Name Substitutions are allowed). "No Shows" will be charged the American Plan Room Only Rate for each night reserved. ! Hotel reservations must be made directly through the Group Reservations Department of the Nottawasaga Inn. Hours are from 8:00 am to 5:00 pm Monday to Friday. ! Reservations must be guaranteed with a credit card number. **Please be advised that 1 night accommodation will be charged to the credit card number on file 14 days prior to your arrival date, with the balance payable upon check-out ! Check-in time is 4:00 pm and check-out time is 12:00 noon**

Return completed form with billing instructions by Friday August 24th, 2007 to:

Attention: Carolyn Laverty
 Nottawasaga Inn Resort

6015 Highway 89, Alliston, ON L9R 1A4

Alliston Phone (705) 435-5501 ■ Toronto Direct Phone (416) 364-5068 ■ Fax (705) 435-5840 ■ Email claverty@NottawasagaResort.com

HOTEL USE ONLY

CONFIRMATION # _____ CONFIRMATION SENT _____



4. Membership Application/Renewal

CREDIT UNION MANAGERS' ASSOCIATION (ONTARIO)

Name: _____

Position: _____ Telephone: _____ Fax: _____

Credit Union or Affiliate: _____

Address: _____

E-mail: _____ Website Address: _____

HOW TO JOIN!

1. Mail your completed application form and send your cheque for \$100 to: **CUMA**
C/O QuintEssential Credit Union
293 Sidney Street, Belleville, Ontario K8P 3Z4
(or via cuco courier)
2. Or fax the forms to 613-966-8909

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Name appearing on card _____

Authorized Signature _____

The Alan Marentette Manager of the Year Award

CO-SPONSORED BY: **CUMA** and **LEVEL FIVE**
strategic partners inc.

NEW NAME!

The Board of Directors of CUMA and our partners at Level Five are pleased to announce that the name for this prestigious annual award has been changed to **The Alan Marentette Manager of the Year Award**.

Alan, who many of you know well, has been a tireless supporter and volunteer in the credit union system during his over 4 decades of service and until his retirement a few years ago. Among his many contributions and accomplishments within the system, Alan was one of the original founders of CUMA which was started over 30 years ago. During his years in the system Alan exemplified all of the high standards of leadership and service that this award was developed to recognize. Plans are also under way to have Alan join us at the banquet to present the award under its new name to the 2007 recipient.

WHAT IS IT?

Level Five Strategic Partners Inc. and The Credit Union Managers' Association of Ontario (CUMA) are pleased to sponsor The Alan Marentette Manager of the Year Award. The award is designed to recognize those Managers who exemplify a high standard of leadership and service to credit unions, their owners and communities.

If you would like additional information, please contact either **Charlie Collura** at ccollura@hmecu.com, 905-575-8888; or **Candis Mirtl** at cmirtl@levelfive.ca, 1-888-311-3030 ex.236. We thank you in advance for your submissions.

NOMINATION FORM

I / We nominate: _____

Name: _____

Credit Union _____

Please describe in an attached document why you feel the nominee is an ideal candidate to receive The Alan Marentette Manager of the Year award (please include any back- up material or documentation to support this nomination.)

Submitted By: (Two signatures required)

Name: _____ Signature: _____ Phone #: (_____) _____

Name: _____ Signature: _____ Phone #: (_____) _____

Date: _____

THE ANNUAL RECIPIENT OF THIS PRESTIGIOUS AWARD WILL RECEIVE:

- A \$2,000 donation made on their behalf to the Ontario Credit Union Charitable Foundation.
- An individual award of recognition to proudly display in their office.
- A letter of recognition for their achievement.
- Featured on the CUMA and Level Five websites

WHO SHOULD BE NOMINATED?

The ideal candidate for The Alan Marentette Manager of the Year Award will demonstrate high standards of leadership within their credit union, the credit union system, and/or their community. The successful candidate will be selected, keeping in mind the mission statement of CUMA, based on the contributions of the individual to serve those around them. If you know someone that you feel deserves recognition for their contributions, we invite you to submit their name for nomination. Past nominee's who have not won the award are welcomed. Note that the candidate can be anyone working in a management position in an Ontario credit union.

NOMINATION PROCEDURES

1. Identify a Manager whom you feel is deserving of this prestigious award.
2. Submit their name along with a description of what makes this person a worthy nominee.

Please provide any supporting documentation that will help the selection committee with their decision. Documentation could include a letter from a member acknowledging superior service, community involvement information, peer or staff input, or any other information that you feel is appropriate.

3. Submit this completed form by September 7th, 2007 to The Alan Marentette Manager of the Year selection committee:

Attn. Candis Mirtl
at Level Five Strategic Partners Inc.
23-4444 Eastgate Parkway, Mississauga, Ontario,
L4W 4T6 or Fax to 905-602-0063 or On-Line at
www.cuma.ca "CUMA Awards"

4. The selection committee consisting of 3 CUMA Board Directors will:
 - Review all nominations
 - Seek additional information if required
 - Select The Alan Marentette Manager of the Year

The successful nominee will be presented with their award by CUMA and Level Five Strategic Partners at the annual fall CUMA conference awards banquet.

WHO QUALIFIES?

All active members of CUMA in good standing as defined by the CUMA general by-law. (See Conference Brochure or www.cuma.ca)

Deadline to Nominate is September 7th, 2007



CUMA & CGI Annual Golf Tournament

SUNDAY, SEPTEMBER 16TH, 2007

Nottawasaga Resort Inn & Conference Centre

For those who would like to start off the conference with the enjoyment of a good game of golf with their fellow managers and conference sponsors, we welcome you to join us for our sixth annual conference golf tournament. We have arranged a "texas scramble" style golf tournament with tee times starting at 9:00 a.m. with the last group off about noon.

Cost for 18 holes of golf (including golf cart and lunch) is \$90.00 (tax included)

Golf registrations are limited to the first 80 golfers registered!

Forward your registration and payment along with your conference registration.

Name: _____

Credit Union or Organization: _____

E-mail: _____ Fax: _____

REGISTER ME AS AN INDIVIDUAL

Paired with _____

All golfers will be notified of their tee-times one week prior to the event.

HOW TO REGISTER!

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