



Speakers Guide

AND PRESENTATION TOPICS

Partners and CUSOs



Corporate Central Credit Union

6262 South Lowell Place, Muskego, WI 53150

The ABC's of ALM

Effective asset liability management is one of the most important responsibilities of any financial institution. Learn the basics of balance sheet optimization by evaluating and understanding important ALM reports for potential earnings interruptions from changes in interest rates.

Presented by: [QuantyPhi](#)

Effective ALM Benchmarking

Benchmarking should be an ongoing process in which credit unions continuously seek the improvement of their balance sheet performance. Information gained from benchmarking allows credit unions to determine how efficient their investment decision-making is relative to the amount of risk they are occurring. Our balance sheet optimization team can assist CEOs, CFOs and other credit union leaders to define the appropriate ALM benchmarking strategies for their credit union.

Presented by: [QuantyPhi](#)

Current ALM Policies and Procedures

Credit unions that practice and employ the most current ALM policies and procedures gain a competitive advantage in the industry. The QuantyPhi team will provide step-by-step guidance to make sure your decision-making and policies are in line with your overall performance and risk results.

Presented by: [QuantyPhi](#)

How Premium Price and Uneven Pre-Payments Impact Bond Performance

The shortfall of using traditional analytics can have a significant impact on actual return. This presentation will uncover why common errors are repeated and teach ways to avoid making those mistakes.

Presented by: [QuantyPhi](#)

Resist Your Instinct and Make Better Balance Sheet Decisions with Better Analysis

Traditional investment analytics can lead to fast decisions, but fast decisions are not always good decisions. Learn more about our quick decision-making process to help you prepare to make a better decision framework before decisions are made. Then, put that thought into action as we review quick financial decisions using the wrong measurements. This presentation will look at our quick decision-making process and help you prepare to make a better decision framework before decisions are made.

Presented by: [QuantyPhi](#)

Are ARMS the Solution for Rising Rates?

In the credit union industry portfolio managers often incorporate adjustable rate mortgage securities (ARMS) into their portfolio to keep up with a rising rate environment. What happens if ARMS do not perform as anticipated? Instead of finding out post purchase we will demonstrate how portfolio managers can develop an understanding of these products and determine the appropriateness of these products in their specific credit union portfolio.

Presented by: [QuantyPhi](#)

Board & ALCO Training

Determine what areas a director should be reviewing and how to ask better questions of management.

Presented by: [QuantyPhi](#)

The Economic Environment

Learn about current economic trends and interest rate information and learn how to position your credit union to maximize your investment dollars and determine what is in the best interest of your membership.

Presented by: [Corporate Central Credit Union](#)

Liquidity Management

Secondary Capital for Credit Unions

The ability for credit unions to accept secondary capital has the potential to create a significant benefit for institutions and members alike. As with any instrument or change in the “norm,” there are important considerations that can create pitfalls if not carefully analyzed. This presentation will provide an overview, discuss the regulatory component, pros and cons, and what to consider prior to acting.

Presented by: [QuantyPhi](#)

Measuring Liquidity in Your Investment Portfolio

Liquidity is a focus for credit unions – both external and internal sources. This presentation will focus on internal liquidity in your investment portfolio including how to measure liquidity, how to build a portfolio for liquidity, and what you should look for going forward. Learn more about the importance of measuring liquidity in your investment portfolio.

Presented by: [QuantyPhi](#)

What Does a Liquid Balance Sheet Look Like?

Credit unions are feeling additional pressure to maintain a liquid balance sheet. With some guidance, we can identify and measure what that means. We will discuss the structure and review liquidity measures beyond loan to share ratios.

Presented by: [QuantyPhi](#)

Loan Profitability Analysis

If you want to be certain you are making enough to cover your cost of funds and other expenses, make sure you are reviewing the asset earnings with all relevant factors. This presentation will review an analysis of a loan program and discuss how we can determine just how much we are earning on that program.

Presented by: [QuantyPhi](#)

Liquidity Solutions for Credit Unions

Corporate Central offers flexible, competitive, and efficient liquidity solutions for credit unions of all shapes and sizes. Public agencies and businesses can provide credit unions with valuable sources of deposits. Those deposits often require supplemental collateral because the amounts exceed NCUA coverage. Corporate Central can provide a useful alternative to pledging securities to collateralize those deposits. This presentation will explore several liquidity options and strategies including: term borrowing, secondary lines of credit, letters of credit, student lending, and issuing non-member deposits.

Presented by: [Corporate Central Credit Union](#)

Healthcare and Employee Benefits

The C-Suite’s Guide to Enhancing Employee Benefits and Reducing Costs

Is there really an option to buy *less* insurance at *lower* costs and *still* deliver high-quality competitive benefits to our employees? Our CUSO’s long and growing list of credit union clients will tell you **YES**. Learn how credit union executives can leverage claims data, cost containment strategies, and advocacy programs to drive down healthcare costs and give employees the benefits they deserve.

Presented by: [InterLutions](#)

Avoid the Vicious Cycle of Health Insurance Renewals

Let’s face it, our healthcare system is broken. The purchasing process is rigged for the insurance carriers to profit (handsomely) while credit unions and their employees continue to pay more. The 12-month cycle of evaluating and renewing medical insurance is vicious for HR and the executive leadership team. To change the course of our employee benefits and medical insurance spending, credit unions need to do something *different* and *better*. Join us and learn about meaningful strategies to get away from this vicious cycle of insurance renewals.

Presented by: [InterLutions](#)

Insurance Captives: How Large Credits Unions Collaborate to Lower Their Benefits Spend

What is self-funding? What is *group* self-funding? And what the *heck* is an insurance captive? But most important of all, what does any of this have to do with beer and wedding cake? We will explain. Insurance is not a fun topic, but our CUSO team will deliver an educational and fun explanation about an innovative model for credit unions to collaborate and lower their benefits spend – through an insurance captive.

Presented by: [InterLutions](#)

Competitive Employee Health Plans for Small Credit Unions

Small credit unions and their employees continue to pay more for health insurance while the carriers continue to profit. After thorough evaluation with a small credit union advisory council, along with a detailed healthcare feasibility study, InterLutions launched a solution to broker competitive medical plans for small credit unions. Learn how a CUSO's customized solutions are helping small credit unions offer affordable and quality employee health plans.

Presented by: [InterLutions](#)

Leverage Data and Technology to Reduce Healthcare Friction

How can credit unions use employee medical insurance claims data and analytics to leverage better healthcare pricing? How can your HR team adopt new technologies to deliver a better enrollment experience to your associates? Delivering competitive, rich, and frictionless benefits to employees is integral to the success of credit unions. Join us as our CUSO team offers five innovative strategies that will reduce the friction in delivering benefits to our most important asset – employees.

Presented by: [InterLutions](#)

Flexible Funding Models to Reduce High-Cost Claims Risk

Has your credit union reviewed unique funding models such as level funding, referenced-based pricing, or self-funding? Depending on your size, makeup, and risk appetite, moving from the traditional fully-insured funding model can significantly reduce one of your largest budget items – employee benefits and healthcare costs.

Presented by: [InterLutions](#)

How a CUSO is Solving the Healthcare Crisis, One Credit Union at a Time

Problem: How can credit unions continue delivering the benefits our employees need when the trajectory of healthcare costs is rising at such a steep pace? **Answer:** Buy *less* insurance at *lower* costs. Well, the problem statement is simple, but the answer is not. And it took our CUSO over five years to build a successful, collaborative, and exclusive credit union healthcare solution. Our white paper and webinar presentation discusses how your credit can buy *less* insurance at *lower* costs.

Presented by: [InterLutions](#)

Cost Containment Strategies

6 Simple Steps for 6-Figure Savings

Learn how to leverage valuable resources in pricing and service data to drive down your big-ticket operational expenses. This presentation outlines six simple steps to realign vendor pricing, increase incentives and income, and remove restrictive service requirements that lead to six-figure savings and mutually beneficial vendor partnerships.

Presented by: [InterLutions](#)

Level the Playing Field with Contract Negotiation Experts

9%. That is the average impact to bottom-line performance resulting from poor contract negotiation. Vendors negotiate contracts for a living, while credit unions typically negotiate contracts every five to seven years. Learn about effective contract negotiation tips and level the playing field!

Presented by: [InterLutions](#)

Fun, Educational, and Engaging Presentations

CU Jeopardy!

A fun and educational game for everyone in attendance. Learn about recent trends in the credit union industry like social media, gen Y, digital banking, and even compliance – all while playing Jeopardy with your fellow credit union friends. Prizes for the winners!

Presented by: [Corporate Central Credit Union](#)

CU Family Feud!

Survey says? We will do our best Steve Harvey impression and host a fun and educational trivia contest. We surveyed 50 credit union professionals about trending credit union topics, such as payments, technology, and credit union history – answers are revealed in a fun, competitive, and educational manner.

Presented by: [Corporate Central Credit Union](#)

Corporate Credit Union Update

Get the latest news and updates regarding Corporate Central, the corporate credit union environment, and the credit union industry in general.

Presented by: [Corporate Central Credit Union](#)

Customized Presentations

If you don't see what you are looking for in the presentation descriptions listed above, we are more than happy to customize a presentation to suit your needs. Please contact us and we would be happy to put together a program for you. To schedule one of the above presentations, please contact us at marketing@corpcu.com or (800) 242-4747.



Chris Felton

President/CEO – Corporate Central Credit Union

"I am fortunate to lead an exceptional team of passionate credit union visionaries laser focused on helping credit unions to be *Wildly Successful*. At Corporate Central we are redefining the role of a corporate credit union and how we deliver innovative solutions to credit unions. Through our family of CUSOs, we have assembled industry leading expertise in technology, balance sheet optimization, and innovative business solutions to serve the credit union movement. A movement that continues to prosper and strengthen on the simple philosophy of "People Helping People." Through stewardship, collaboration, and exceptional member service we help credit unions serve their members and successfully grow."

Chris became President/CEO in May 2016. He began his career at Corporate Central in 1990 as the first field representative; and spent his early years on the road building relationships with credit unions. After holding various leadership positions, Chris was promoted to Executive Vice President in 2012, overseeing areas such as planning, sales, strategic partnerships, operations, budgeting and forecasting, and market expansion. Chris has 27+ years of experience proudly serving the members of Corporate Central, endeavoring to improve the financial success of all members by creating member value and enduring partnerships.

As President/CEO, Chris is responsible for the culture, vision, and strategic direction of Corporate Central. Chris focuses his leadership team on growing the organization, expanding member relationships, acquiring new members, developing new services, securing new service partners, and delivering service excellence. His strategic vision for Corporate Central is to collaborate on initiatives and innovation to help members to be *wildly* successful.

Chris's educational background includes a bachelor's degree in Finance from the University of Wisconsin-Milwaukee. For 31 years, Chris has been the lucky husband to his bride, Kristy, and he is also an inspired father to three wonderful children - a son and two daughters.



Gregg Tushaus

Senior Vice President/Chief Technology and Strategy Officer – Corporate Central Credit Union

Gregg joined Corporate Central in December 2016 as the Senior Vice President / Chief Technology and Strategy Officer. He is responsible for providing vision, strategy, leadership, and technical expertise for developing and delivering information technology services that facilitate the organizational strategy and goals. As the Chief Technology and Strategy Officer, Gregg provides technical leadership and innovation and pursues technology entrepreneurial opportunities. We are pursuing FinTech ventures and applying innovative technology in the finance and investing space for our credit union members. The financial services industry is changing, and technology is a major driver. Corporate Central will provide credit unions technology leadership and enhance technology services such as cloud transformation, digital transformation, mobile, big data, identity management, block chain, and artificial intelligence.

In August 2017, Gregg took on an additional role as the President for Corporate Central's Technology CUSO, Emergifi. Gregg provided leadership for a technology solutions company with a singular credit union focus streamlining operations, reducing costs, enabling faster response, increasing productivity, and improving security. In May 2022, Emergifi strategically merged with [Think|Stack](#) to provide credit unions greater access to technology related products and services. Additionally, Gregg serves as a member of the Think|Stack board of directors.

Gregg is the founder, and former CEO, of Tushaus Computer Services. He had a successful exit after selling Tushaus Computer Services to Dedicated Computing in 2011. He continued to serve as a member of the executive team, Chief Information Officer, until departing in 2016. The company saw exceptional growth under his leadership, growing to more than 140 employees with revenues exceeding \$32 million. Tushaus is an Inc. 500 company, a VAR Business 500 company, and was selected as a FUTURE 50 company in 1996, 1997, and 1998 by the Council of Small Business Executives through the Metropolitan Association of Commerce (MMAC). Financial services were a major customer segment for Tushaus Computer Services including many credit unions. His financial services experience extends back nearly 30 years.

Gregg received a bachelor's degree in Management Information Systems from the University of Wisconsin-Milwaukee. He has been recognized by numerous business and technology organizations, and most recently received the BizStarts Milwaukee's "Inspirational Entrepreneur" award, presented to Milwaukee area business leaders who have successfully established thriving companies in Milwaukee. Gregg was recognized in the "Who's Who" list in Milwaukee by The Business Journal and as one of The Business Journal's 40 Under 40, Wisconsin's new generation of business and community leaders. Gregg is a past member of the Milwaukee chapter of Young Entrepreneur's Organization (YEO), a member of the Rotary Club of Milwaukee, a member of the Metropolitan Milwaukee Association of Commerce (MMAC), and a member of the CEO Roundtable program through the MMAC. Gregg is a member of the prestigious Birthing of Giants program, class of 2000, co-sponsored by Inc. Magazine, YEO, and Massachusetts Institute of Technology (MIT).

In his free time, Gregg enjoys playing golf, pickleball, snowboarding, watching movies, and playing video games.



Nicholas A. Fanning, CFA

Senior Vice President/Chief Financial Officer – Corporate Central Credit Union

Nick brings 20+ years of experience serving credit unions to his role of Senior Vice President / Chief Financial Officer. He is responsible for leading all aspects of the investments, accounting, lending, and asset/liability management functions for Corporate Central. In his prior role, he also directed the IT department for nearly ten years.

Nick has honed his skills in the management of the organization's investment and loan portfolios, funding and liquidity positioning, investment and credit analysis, asset/liability management (ALM), financial modeling, and the development and pricing of financial products and services in the years since he began his career at Corporate Central in 1997. He has been entrusted to manage Corporate Central's balance sheet since 2002. Nick also passionately presents on topics related to investments, economics, asset/liability management, and risk management.

As a member of the Executive Management team, Nick is significantly involved in strategic planning, establishing goals and objectives, budgeting, developing and maintaining effective policies, and ensuring compliance with regulations. He is a member of the Asset/Liability Committee (ALCO) and the Enterprise Risk Management Committee (ERMC).

Nick has bachelor's degrees in both Finance and Economics and is also a Chartered Financial Analyst (CFA) charter holder. He is a member of the CFA Institute and the CFA Society of Milwaukee. Nick was also appointed to the Board of Directors of the Wisconsin CUES Council in 2017.



Kevin P. Chiappetta, CFA

Senior Vice President / Chief Education & Research Officer

Kevin's initial career at Corporate Central began in January 1996 as Vice President Investments where he managed the loan, deposit, and investment portfolios. Kevin departed in June 2002, where he spent over 11 years working with credit union investment CUSOs and 2 years with an asset-liability modeling and consulting firm. Working primarily with credit unions throughout his career, Kevin brings a rich history of over 30 years of experience providing financial services, with a primary emphasis in fixed income security analysis, portfolio management, and balance sheet risk management.

In August 2016, Corporate Central welcomed Kevin back as the Senior Vice President Investment Services to assist members in understanding the complete risk profile of their balance sheet risk, re-think traditional security analysis, and build portfolios to compliment the optimal performance of the entire balance sheet. Kevin also focuses on the continuing education for members and their supervisory committees and boards.

In May 2017, Corporate Central launched its balance sheet optimization CUSO, QuantaPhi, and named Kevin as President. QuantaPhi's ALM experts focus on finding opportunity on both sides of the balance sheet by running what-if scenarios that facilitate successful relative-value balance sheet decisions.

In March 2024, Kevin accepted a new role as Senior Vice President / Chief Education & Research Officer. In this role, he serves as a dedicated expert executive that educates, trains, and gives back to the movement by teaching and instructing on everything related to balance sheet management and risk mitigation.

Kevin's education includes a bachelor's degree in Accounting from St. Norbert College in De Pere, WI. Kevin is a Chartered Financial Analyst (CFA) charterholder and an active member and volunteer for the CFA Institute in Charlottesville, VA. Kevin was elected to the CFA Society Milwaukee Board in July 2019 and elected as President in 2021. He has been an active member of the society for over 25 years. In December 2023, Kevin successfully completed the Executive Master of Business Administration (EMBA) program at Marquette University in Milwaukee, WI. In January 2024, he embarked on a role as a Lecturer in Finance, commonly referred to as an Adjunct Professor, at UW-Milwaukee and in August 2024, he added another role as Adjunct Professor at Marquette University.

Kevin married his college sweetheart in 1987 and assisted in the upbringing of their son and daughter. As of today, Kevin still has the role of cheerleader, proud supporter, and provider of unlimited, unsolicited life advice to his children. In his free time, Kevin is interested in soccer at all levels, watching a variety of sports, reading about interesting topics, spending time with family, and correcting their grammatical errors.



Jesse Kohl

**Senior Vice President Corporate Development – Corporate Central Credit Union
President – InterLutions CUSO**

Jesse started his career in the movement during college while interning at a credit union. He fell in love with the "people helping people" philosophy and has played an instrumental role in leveraging the collaborative spirit of credit unions to build innovative services that drive down costs.

In August of 2002, Jesse joined Corporate Central as a Business Development Executive and soon-after was promoted to leadership roles in the marketing, sales, and strategic alliance departments. In 2016, Jesse joined the executive leadership team at Corporate Central and was named President of the CUSO InterLutions.

With nearly 20 years of experience working in the credit union movement, Jesse is proud of the accomplishments credit unions have achieved over the years, and believes there is tremendous opportunity for all credit unions to become wildly successful. "It's been an absolute joy working with so many credit unions across the country, and witnessing first-hand the amazing benefits credit unions provide to their members and communities."

Jesse graduated from the University of Wisconsin-Whitewater in 2002 with a bachelor's degree in Business Finance. Although 50 years late to the wild music scene known as the British Invasion, Jesse still considers himself a "Beatle-maniac," has learned every Beatles song on guitar, and will challenge anyone to a game of Beatles Trivial Pursuit. He resides in Fort Atkinson, WI with his wife and three children and keeps busy volunteering at his church and coaching his kids' basketball, track, and softball teams.



Danny McIntyre

Vice President Investment Services – Corporate Central Credit Union / QuantaPhi

Danny brings over 35 years' experience in the financial services industry. He began his career in New Orleans trading US Treasury, Federal Agency and mortgage-backed securities. In 1987 he and his new bride Diana moved to Dallas, TX where he established and managed a taxable bond trading desk for a regional brokerage firm.

In January 2003, Danny “discovered” credit unions. He worked at a corporate credit union to help establish a broker-dealer and trading desk and very quickly became a big fan of the credit union movement. He has spent the past 14 years dedicated to helping credit unions be successful. Actively involved in asset liability management, he has helped credit unions build investment portfolios that complement their balance sheets and help them manage based on both risk as well as return. Assisting with education and training for credit union professionals and volunteers remains a primary focus for Danny as well. “Education allows us to help members be more efficient which in turn affords them more time to serve their members – people helping people.”

Danny attended Loyola University and Delgado College in New Orleans. He completed his studies as a business major at Tulane University. He holds his Series 7 and 63 licenses. When asked about his greatest accomplishment, Danny points to convincing his wife Diana to marry him 30+ years ago. He said the only two things that come close to that are raising their son, Chase, and watching the Saints win the Super Bowl in 2009, although he admittedly had little to do with the latter.

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Adam Stone

Senior Vice President Investment Services – Corporate Central Credit Union
President – QuantumPhi

Adam Stone joined Corporate Central and QuantumPhi as Vice President ALM & Investments in May 2020 and was promoted to Executive Vice President Investment Services of QuantumPhi in January 2023. In March of 2024, he accepted the role of President of QuantumPhi. He has been primarily responsible for managing ALM and consulting programs for member credit unions. Additionally, he has overseen the sales of investment products to member credit unions as well as the design and execution of QuantumPhi's business plan and growth initiatives.

Adam has over 17 years of experience in the financial services industry. He spent eight years as an Investment Analyst and Senior Investment Analyst for Corporate Central. Then he moved to New York City where he spent six years as a Senior Consultant and Manager for a large audit and advisory firm specializing in treasury, ALM and liquidity risk management for large, global financial institutions. Adam earned his bachelor's degree in Economics from UW-Madison.



Ryan McMillan

Technology Services Director – Corporate Central Credit Union

Ryan rejoined Corporate Central in May 2024 as Technology Services Director. He plays a crucial role in the advancement of the organization's technology development and delivery. His vision extends to making Corporate Central a technology leader in the credit union industry by fostering collaborative relationships among internal business units, members, and third-party partners/vendors.

With a rich background spanning over two decades in IT, governance, compliance, and risk management, Ryan brings a wealth of expertise to Corporate Central. Prior to his return, Ryan held a position as a Senior Solutions Architect, where he honed his skills in solutions engineering and client engagement.

Outside of his professional endeavors, Ryan is passionate about coaching youth baseball, leveraging his love for the game to mentor young players. He also values spending quality time with his wife, four children, and two dogs, cherishing relaxed and meaningful moments with his family.



John F. Hickey, CCUIP, CWCUL
Vice President Investments – Corporate Central Credit Union

John started his career at Corporate Central in July 2007 as an Investments Officer. In January 2014, he was promoted to Vice President Investments. John directs daily functions related to member loan operations and asset liability management (ALM). He serves as portfolio manager for investments, loans and deposits, and is a member of the ALCO Committee. Additionally, John is responsible for research and development of new products, services, and partner relationships.

Prior to joining Corporate Central, John was a 10-year veteran of the commercial and industrial lending sector with experience in loan origination, portfolio management, structuring, and underwriting with both regional and national banks. In 2009, John became a registered representative and began working exclusively with credit union CEOs and CFOs trading marketable securities. He holds his Series 7 and 63 licenses, and Six Sigma Green Belt certification. In 2018, John participated in The Wisconsin Credit Union League’s Leadership Program and earned the designation for Certified Wisconsin Credit Union Leader (CWCUL).

John received a bachelor's degree from UW-Madison. He is also a retired semi-professional rugby player.

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