

You're Invited!

Asset/Liability Management for Marketers Seminar

Learn how to identify the needs of your credit union and become more proactive in your marketing efforts.

Dallas/Ft. Worth (American Airlines FCU)
Tuesday, April 20

Houston (MemberSource CU)
Wednesday, April 21

Austin (A+ FCU)
Thursday, April 22

AGENDA AND DETAILS

8:30	Registration
9:00 – 10:00	Introduction and four primary goals of asset/liability for management for marketers <ul style="list-style-type: none">- Identify sources and uses of cash to aid in developing marketing strategies- Review of a basic financial statement and discussion on the buy and sell process
10:00 – 10:15	Break
10:15 – 12:00	Eleven key ratios every marketer should know to be relevant and accountable <ul style="list-style-type: none">- Ratios include a definition, formula, industry standard results and impact factors
12:00 – 1:00	Lunch
1:00 – 2:00	Your CU-specific key ratios <ul style="list-style-type: none">- Where does your credit union buy money?- Where does your credit union sell money?
2:00 – 2:15	Break
2:15 – 3:00	Developing a ROI worksheet

Presenter, Deborah L. Rightmire, CCUE

Deborah L. Rightmire is vice president of asset/liability management for the Texas Credit Union League, overseeing the operations of TCUL ALM Resources. She provides semi-annual ALM analysis and consulting services for credit unions across the U.S. representing over \$90 billion in combined assets. She speaks for CUNA and Leagues across the nation. Debbie conducts presentations emphasizing ratio analysis, policy formulation, economic trends, liquidity analysis, and investment due diligence.

As a senior faculty member of Southwest CUNA Management School, Debbie instructs, assists with curriculum development, and evaluates the Financial Management Key Result Area of students' three-year strategic business plans.

Audiences benefit from Debbie's prior experience as a credit union representative for the Texas Credit Union League, service on the Board of Directors and Asset/Liability Management Committee (ALCO) of Metroplex Credit Union in Dallas and her 30 years in the financial service industry.

Debbie joined the Texas Credit Union League in 1979 and is a graduate of the University of Alaska.



LOCATIONS (Each session has limited seating. Register early to guarantee your place.)

Dallas/Ft. Worth	Houston	Austin
American Airlines FCU 4151 Amon Carter Blvd Fort Worth, TX 76155	MemberSource CU 10100 Richmond Ave Houston, TX 77042	A+ FCU 6420 Hwy 290 East Austin, TX 78723

AREA EXECUTIVE COMMITTEE MEMBERS

Erayne Hill, Unity One CU (817) 306-3106	Ben Newcomb, Transtar FCU (832) 201-0183	Stan Cowan, A+ FCU (512) 302-6814
Ron Knight, Prestige Community (972) 774-3135	Tina Linquist, AMOCO FCU (409) 948-8541	Lyndee Bennett, UFCU (512) 467-8080 ext 22363
Jennifer Hernandez, City CU (214) 319-3078		

Education Investment (New reduced rates!)

Texas Credit Union Marketing Council Member Rate	\$85 per person
Non-Member Rate	\$129 per person

Cancellation Policy

Substitutions are always welcome. Registration refunds (less than a \$50 processing fee per person) are granted for cancellations received one week prior to the seminar.

Other Information

Attire is business casual. Bring a jacket or sweater as room temperatures may vary. If you have physical, medical or dietary needs requiring special attention, please let us know at the time you register.

REGISTRATION

CU Name: _____ TCUL CU ID #: _____
 CU Address/City/St/Zip: _____
 Person completing form: _____ Phone: _____

Please register the following:

Name	Title	Seminar	City
_____	_____	_____	_____

Two Easy Payment Methods – Please check one: (payment must accompany registration)

Enclosed is a Share draft/check for \$_____ payable to the TX CU Marketing Council

I authorize Southwest Corporate FCU to Debit the credit union account for \$ _____

Account # _____ Authorized Signature _____

Please fax your registration to Marketing Resources, Attn: Bonnie Cox - Fax: (469) 385-6570

Questions? Contact Bonnie Cox: (469) 385-6421 or (800) 442-5762, ext 6421; Fax: (469) 385-6570;
 Email: bcox@tcul.coop

