
CFO Forum

September 16, 2024

Hyatt Regency Greenville
220 North Main St, Greenville, SC 29601

All times listed in local time
subject to change.

Times & Sessions

Monday, September 16, 2024

MON 9/16/2024
7:30 - 8:00 AM

Networking Breakfast

Enjoy breakfast with your Finance peers.

MON 9/16/2024
8:00 - 10:15 AM

Welcome, Introductions, and What Keeps You Up at Night?

Brett Fisher, Chief Financial Officer, Skyla Credit Union
Karen Haas, Chief Financial Officer, Illinois Credit Union League

Do you ever wonder what your fellow CFO's are up late at night thinking about? This will be your opportunity to hear and learn from people like you! A session for everyone to participate. Look forward to both open discussion, as well as targeted table discussions. A survey will be sent prior to the Forum for this session.

MON 9/16/2024
10:15 - 10:30 AM

Break

MON 9/16/2024
10:30 - 11:45 AM

Ed Lis, Chief Financial Officer, First Choice Financial FCU

Strategic Pricing in a Volatile Rate Environment

In this session, participants will apply the Risk Adjusted Return on Assets (RAROA) to ensure that pricing strategies are financially sustainable and aligned with the interests of the membership. RAROA should reflect your unique operational model and commitment to member service. Using a market-based benchmark as inputs for pricing loans and deposits ensures the Credit Union's pricing is competitive, reflective of market conditions, and fully accounts for risk and profitability.

MON 9/16/2024
11:45 AM - 12:15 PM

Networking Lunch

Enjoy lunch with your Finance peers.

MON 9/16/2024
12:15 - 1:15 PM

Cybersecurity Discussion

Cybersecurity resilience should be top of mind for Credit Union CFO's. During this session, we'll discuss the importance of staying up to date with your cybersecurity.

MON 9/16/2024
1:15 - 1:30 PM

Break

MON 9/16/2024
1:30 PM - 2:45 PM

Federal Home Loan Bank of Atlanta

The Federal Home Loan Bank of Atlanta will give an update on the FHLB system, liquidity options, examples of how participating credit unions are using the FHLB, and more.

MON 9/16/2024
2:45 - 3:00 PM

Open Discussion and Closing Remarks

Brett Fisher, Chief Financial Officer, Skyla Credit Union
Karen Haas, Chief Financial Officer, Illinois Credit Union League

Speaker Bios



Ed Lis, Chief Financial Officer, First Choice Financial FCU
elis@fcfinancialcu.org

Ed Lis is the Chief Financial Officer (CFO) of First Choice Financial FCU. During the financial recession caused by the housing market collapse, Ed served as CEO, navigating the challenges of a global financial crisis characterized by widespread banking failures, job losses, and economic downturns. With extensive leadership experience and a wealth of knowledge, Ed is recognized for his hands-on approach and substantial contributions to profitability and growth.