

INVITATION ONLY

CREDIT UNION FINANCIAL FORUM

MONDAY, OCTOBER 19 · TUESDAY, OCTOBER 20, 2026 · NEW YORK CITY

SUNDAY, OCTOBER 18 Hotel Accommodations: W New York Times Square, 1567 Broadway

West Coast Arrivals. Black car service provided from the airport to the hotel

MONDAY, OCTOBER 19 Closing Bell and Fireside Chat

East Coast Arrivals. Black car service provided from the airport to the hotel

2:15 PM Shuttle departs the hotel lobby

New York Stock Exchange · 11 Wall Street · Hamilton Room

3:00 PM **VIP Tour of the New York Stock Exchange**, including the Closing Bell

4:10 PM **Cocktail Reception**, Hamilton Room

5:00 PM **Fireside Chat with the Honorable Rodney E. Hood**, former Chairman of the National Credit Union Administration and former Acting Comptroller of the Currency

5:45 PM Shuttle to the hosted dinner

6:30 PM **Dinner Hosted by Advisors Equity Group**, Toscana 49

10:00 PM Return by shuttle to the hotel

TUESDAY, OCTOBER 20 **Morgan Stanley Worldwide Headquarters** 1585 Broadway, across from the hotel

7:00 AM Breakfast at the hotel, on your own

MORNING SESSION · 9:00 AM TO NOON

9:00 AM **AEG and DCUC Kickoff**, Michael T. Rossi, President and Co-Founder, Advisors Equity Group, and Anthony Hernandez, President and CEO, Defense Credit Union Council

9:30 AM **Charting the Course: Annexus' Journey of Innovation, Success, and Strategic Growth**, James Hahn, Executive Vice President, Annexus Sales and Distribution, Annexus

10:00 AM **Annexus**, Thomas Haines, Executive Vice President, Capital Markets and Index Solutions, Annexus

11:00 AM Break

11:10 AM **Thinking Differently About 701.19 and Charitable Donation Accounts**, Michael T. Rossi, President and Co-Founder, Advisors Equity Group

Noon **Luncheon Hosted by Morgan Stanley**

AFTERNOON SESSION · 1:00 TO 2:30 PM

1:00 PM **What It Takes to Become an AI-Native Organization**, Farouk Jiviani, CEO, Zeroe

2:00 PM **Family Security Plan Overview**, Sean McGinley, CEO, Family Security Plan

Departures Black car service provided from the hotel to the airport