



2016 DocuMatix User Conference

February 18 - 19, 2016

Aria Hotel and Resort
Las Vegas, Nevada

\$148/night
Hotel & Resort Fee

\$129
Conference Registration

**Seating is Limited - Reserve Today*



Conference Speakers



Mark Arnold
Keynote Speaker



Karen DiSantis
Franklin Mint FCU



MaryAbigail Dills
Solarity Credit Union



Gail Wenger
PSECU



Kellie Cook
Dupaco Community CU



Sarah Cecchin
1st United Services CU



Colleen King
Allegacy Federal CU



Melissa Wilhelm
CoVantage CU

About the Speakers



Mark Arnold - Keynote Speaker

Mark Arnold, CCUE, is an acclaimed speaker, brand expert and strategic planner. Mark speaks regularly to audiences around the country on branding, marketing, strategy, leadership, personal growth and generational issues. With over 20 years experience in the financial services industry, Mark's breadth of knowledge covers areas such as marketing, business development, human resources, training, and sales.

He is also president of On the Mark Strategies, a consulting firm specializing in branding and strategic planning. Not a mere consultant, Mark helps "mark organizations for success" by partnering with them to help achieve their desired strategic goals. Some of the services Mark provides include strategic planning, brand planning, leadership training, and staff training. Mark is the author of multiple books, including Think Huge: Elevating Your Life and Your Business, My Best Service Ever and Marketing Across the Generations: Gen. X. Mark's blog (markarnold.com) was recently recognized as one of the top 20 blogs in the country for financial marketing.



Karen DiSantis Senior Electronic Marketing & Design Specialist Franklin Mint Federal Credit Union

Karen DiSantis is a Senior Electronic Marketing & Design Specialist for Franklin Mint Federal Credit Union (FMFCU). She has 7+ years' experience in Electronic Marketing for FMFCU and over 10 years' experience in Marketing and Graphic Design. She is the marketing lead of our electronic delivery team utilizing marketing strategies to promote our robust product and services offerings through email marketing, video displays, online advertising, etc. Karen has a dual bachelor's degree: BA in Graphic Design and Web Development from Delaware College of Art and Design and a BS in Sports Management from Neumann University. She is currently pursuing her Master's in Business Administration at Villanova University.

About Franklin Mint Federal Credit Union

Franklin Mint Federal Credit Union has provided financial products and services to its members in the greater Philadelphia region and beyond since 1970. Now with over \$900 million in assets, FMFCU ranks tenth in asset size in Pennsylvania and remains the largest credit union headquartered in Delaware County, Pennsylvania. FMFCU has 80,000 members, and 2,000 partnering organizations. For more information, visit fmfcu.org.



MaryAbigail Dills VP of Marketing Solarity Credit Union

MaryAbigail, VP of Marketing, has worked at Solarity Credit Union for just over a year. Her experience from her previous positions at a marketing and advertising agency and as a VP at the Chamber of Commerce has given her the skillset to focus on efficient processes using technology, managing creative talent internally, leveraging data for targeted marketing, managing public relations and marketing campaigns, and focusing on employee brand engagement.

About Solarity Credit Union

Solarity Credit Union is located in central Washington in Yakima and Kittitas counties. Solarity's unique internal culture that fosters innovation, positivity, doing more with less, and accountability has led to significant growth, from \$220 million in 2005 to \$573.3 in 2015. Solarity serves 50,000 members with 132 employees. Membership is open to anyone who lives, works, worships, or attends school within a Washington state school district.

About the Speakers



Gail Wenger
Director, Marketing Research and Analytics
Pennsylvania State Employees FCU

Gail Wenger is Director of Data Analytics and Research at PSECU. She has been with PSECU for over 15 years and has previous experience in banking and consulting. She oversees PSECU's consumer data and analytics strategy including targeted marketing audiences, market segmentation, predictive analytics, campaign results/ROI and tracking of strategic initiatives. She also oversees the research group that is responsible for competitive research, member feedback, brand awareness and primary research on consumer behavior and creative testing. Gail also led the implementation of PSECU's Voice of the Customer and Customer Relationship Management initiatives last year. A recent graduate of Leadership Lancaster Area in PA, Gail is an active member of the community and various non-profit groups.

About PSECU

Opened in 1934, PSECU was founded by 22 ordinary people who made an extraordinary commitment to each other: To create a financial institution where pooled resources benefit all members. Today, the Harrisburg, PA-based full-service credit union serves more than 400,000 members and has over \$4 billion in assets. As a not-for-profit financial institution, our goal remains to help our members and their families achieve a better life. For more information, visit psecu.com.



Kellie Cook
Marketing Data Analyst
Dupaco Community Credit Union

My business career began in the telecommunications field where I was able to work my way into a management position in only 4 years. The management promotion was the result of my strong interpersonal skills and high job performance. As a supervisor, I obtained invaluable skills such as building relationships with different personality types and applying continuous change in order to be successful. After almost 7 years in the telecommunications field, I moved into the IT field as an Audit and Compliance Focal. As an Audit and Compliance Focal I was able to strengthen my computer software skills, and build on my communication skills. I was recognized quickly as a top performer and placed on the most difficult accounts within my department. Working on more in depth accounts allowed me to develop strong problem solving and stress management skills. I am currently working as a Data Marketing Analyst for Dupaco Community Credit Union in Dubuque, IA. As a data analyst at the Credit Union I have been able to analyze the success of marketing campaigns and create more targeted marketing campaigns. I am a power user of excel which allows me to process large amounts of data in a timely manner. As a part of Dupaco, I strive to not only provide offers for our members, but also deepen the member's relationship through ongoing communication and education.

About Dupaco Community Credit Union

Dupaco Community Credit Union was chartered in 1948 when ten employees of the Dubuque Packing Company pooled \$5 each in combination with a loan for \$123.20 from the Amalgamated Meat Cutters Local Number 150, to begin operations. From these humble beginnings, Dupaco Community Credit Union has grown exponentially. As membership and branch locations have grown so has our ability to provide an expanded range of cost-effective financial services designed to help members get ahead while meeting their lifetime financial needs. Dupaco currently has 19 branches in Iowa, Illinois and Wisconsin. Asset size is over 1B.

About the Speakers



Sarah Cecchin
Senior Vice President, Marketing
1st United Services Credit Union

Sarah has been in the credit union industry for nearly 20 years, most recently as the Senior Vice President of Marketing and Communications at 1st United Services Credit Union, a position she still has as of press time. Leading the DocuMatix client base in questions and service calls for eight years, Sarah is still hard at work designing a highly intelligent, data focused, set it and forget it approach to automated email marketing.

About 1st United Services Credit Union

It doesn't get more friendly and welcoming than 1st United Services Credit Union. Thriving in the highly competitive San Francisco Bay Area, we pride ourselves on delivering a fast, tech-savvy experience, without sacrificing personal one-on-one service. We believe in local, neighborly banking and hope you will too.



Colleen King
Digital Specialist, Marketing
Allegacy Federal Credit Union

Colleen is a graduate of Sonoma State University with a BS in Business, concentration Marketing. She has worked in the credit union industry for more than ten years. As a Digital Marketing Specialist, Colleen assists with the development and spearheads the execution of the online marketing plan through concept development, planning, implementation and coordination of online initiatives. Her strong knowledge of the digital channel and designing for technological environments allows her to improve the online member experience and bring Allegacy's mission to life one pixel, hashtag or at a time.

About Allegacy FCU

Allegacy is one of the largest credit unions in North Carolina, with members throughout the world. Founded in 1967 in Winston-Salem, Allegacy has a broad membership base that currently serves the employees, retirees and families of over 600 companies throughout the country. Allegacy offers virtually all personal and business financial services. Allegacy Financial Centers are concentrated in the Triad area with 15 convenient locations and eight high school student-run credit unions in the Winston-Salem/Forsyth County School system. For more information, visit AllegacyFCU.org.



Melissa Wilhelm
Online Marketing Specialist
CoVantage Credit Union

Melissa Wilhelm has worked at CoVantage Credit Union for eight years, serving as the Online Marketing Specialist at CoVantage for the last six. Her current position allows her to write copy for internal and external communications; manage social media, online, and traditional marketing; dabble in graphic and web design; assist in development of online and mobile banking platforms; and plan community fundraising events.

Melissa holds a bachelor's degree from University of Northwestern – St Paul.

About CoVantage

CoVantage Credit Union is based in Antigo, Wisconsin and serves a community charter in northern Wisconsin and two counties in upper Michigan. CoVantage has grown significantly since they came into business in 1953 and currently stands at \$1.2 billion dollars in assets, over 83,000 members, and 330 employees.