Opening Session, Tuesday, April 19

Watching for the Housing Rebound
David L. Stiff, Chief Economist, Fiserv Case-Shiller®

Economic improvement is tied to factors that include consumer behavior, the housing industry and the availability of credit. Unemployment, spending, government programs and sales data are all indicators of what and when things may improve. Since the housing market was the first indicator to decline it may well be the first place to signal recovery. This session will review the latest national economic indicators and provide a forecast for stabilization and a return to growth.

About David Stiff – As chief economist for the Case-Shiller group of Fiserv, David Stiff directs the research and development of the group’s quantitative valuation, home price index, and forecasting models. David joined the company in 2000, after holding the position of manager of regional economics at Standard & Poor’s DRI, where he supervised the production of economic forecasts for all U.S. states, cities, and counties.
ASP, Online Channel and Payments Forum

**ASP Round Table Discussion**
Join this peer-to-peer round table discussion where you drive the conversations that are relevant to credit unions leveraging or considering DataSafe online. Your session moderator will help ensure the session’s focus on the non-technical business issues that are important to you.

Moderator: Rick Rinaudo

**Electronic Payments and Card Processing**
Electronic transaction processing can serve as both a critical member service and a key efficiency driver for your credit union. Join us to discuss DataSafe initiatives designed to help you achieve your goals in this dynamic, evolving area of your business.

Presenter: Michael Esser

**Virtuoso™ Home Banking Road Map**
Join us for a review new member benefits from Virtuoso for DataSafe that will be introduced in 2011. You’ll experience a comprehensive review of the 2011 roadmap including specific product enhancements, security updates and maintenance. The session will also include an overview of the process surrounding this year’s multifactor authentication software upgrade.

Presenter: Tony Mlodzianowski

**Personal Finance Management**
Explore the future of personal finance management within Virtuoso from DataSafe home banking. We’ll demonstrate the fully integrated Virtuoso solution for personal finance management and account aggregation. See how you can empower your members with a holistic view of their financial assets, liabilities and budgets. Plus, learn about branding options and a fully integrated marketing platform to maximize the value of this new solution.

Presenter: Tony Mlodzianowski
Systems Forum

Maintaining Your Access RMS for DataSafe Optical Environment
This session for IT professionals and systems administrators will cover best practices for maintaining your Access RMS optical systems, including database maintenance, backups, troubleshooting techniques, common issues, and tips and tricks. You'll also learn about new features and options introduced with AX 6.5.

Presenter: Joe Murray

Optical Storage Replacement for Jukeboxes
Grow It Green. Learn about advanced optical storage with the ProStor InfiniVault™ which leverages RDX technology to store optical WORM images and RW files. Jukeboxes and their platters can be efficiently replaced by these new technologies that provide capabilities such as RW (read write), speed, encryption and PCI compliance. You'll also learn about the durability of the removable disk cartridges and see a live “disaster” recovery system demonstration.

Presenter: Joe Murray

Caché 2010 and Multiprotocol Switching Labels
This session will cover topics ranging from Caché 2010 testing, Caché 2010 benchmark data, new features (Caché, MultiNet, OpenVMS), security, new manager options and the upgrade process. Discover how multiprotocol label switching provides a holistic approach to understanding your current and future needs for the entire branch network. The Caché 2010 for DataSafe product will be available for general release in June 2011 in conjunction with the DataSafe service pack 22. The Caché 2010 product includes InterSystems Caché® database engine release 2010.2, Process Software’s MultiNet TCP/IP version 5.3 and the OpenVMS operating system 8.4.

Presenter: Peter Klee and Rick Rinaudo

Managed Firewall and Network Support Services
This session will introduce two new networking services available from Credit Union Solutions at Fiserv. Learn about the benefits, features and overall of our Managed Firewall Services and Network Security Services solutions. These services offer attractive benefits to credit unions with up to $150 million in assets that are seeking a single source network solution.

Presenter: Terry Murphy
Commercial Accounts Forum

**Commercial DDA and Cash Management**
In this session we will provide an introduction to the new commercial DDA and cash management functionality within DataSafe. Explore features such as DDA account maintenance, service charge design, ACH origination, zero balance accounts and sweep functionality.

Presenter: Carmen Holt

**Commercial Loan Servicing**
Discover the new DataSafe commercial loan servicing product. This session will provide an overview of the solution’s capabilities including basic loan, collateral, delinquency, and tickler servicing and relationship manager 360 view.

Presenter: Joel Hamburger

**Commercial Account Analysis, Online Banking and “What’s Next?”**
Join us to learn about the new functionality that’s included in our commercial account analysis/billing and commercial online banking solutions.

Presenter: Carmen Holt

**Commercial Loan Servicing and “What’s Next?”**
Join us for further exploration of our commercial loan servicing capability. Learn how the new product handles specialized loan processing such as SBA and guaranteed lending, participations, sweeps, reports, notices and billing. We will also touch on future functionality to address construction lending, asset-based lending and relationship profitability.

Presenter: Joel Hamburger
Planning Ahead Forum

**DataSafe Compliance Summary**
Managing compliance and regulatory change has become increasingly complex with today’s ever-evolving regulatory landscape. Learn how recent regulatory changes impact the DataSafe account processing platform and your operations.

Presenter: Scott Masi

**Product Calendar Updates for 2011**
Join us for an overview of the software development plans for DataSafe. Learn about the newest products and enhancements and discover how Fiserv solutions will enhance your ability to provide exceptional service to your members, while increasing operational efficiencies at your credit union.

Presenter: Wade Bennett

**Best Practices for Service Pack Implementation**
Has your credit union stayed up-to-date with service packs from DataSafe? Do you take a project management approach to service pack implementation? How are regulatory enhancements communicated and executed throughout your credit union? Who manages new system products, features and procedures and the required staff training? Discover best-practice examples for planning and implementing service packs/feature packs with a role-based approach for maximum effectiveness.

Presenter: Kevin Gisi
What’s New With eLearning for DataSafe?

Hear how our educational services team has expanded the DataSafe eLearning courses to include the following in-depth product courses:

- Teller Navigator: when combined with training from the credit union on procedures, this course can train a new employee or serve as a refresher for existing employees
- Introduction to back office: designed for the new IT employee
- Lending Navigator: designed for loan processors
- Cash device interface: two-Forum course designed for IT professionals and tellers

Learn how your credit union can take advantage of these courses to enhance your employees’ product knowledge and productivity.

Presenter: Laura McEnany