

# 2017 Conference Takeaways

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Last month we finished another CFS/SPF Annual Conference for the record books, and it was phenomenal! More than 600 advisors, program managers, executives, and partners were on hand to learn, network, and get motivated to *thrive amid change*.

Here are some quick stats and top takeaways on the 2017 conference.

- 100 Pacesetters
- 3,660 Breakout Minutes
- 200+ Keynote Minutes
- 11+ Hours of Networking
- Nearly 50 exhibitors
- \$6,000+ Dollars Raised for Challenged Athletes

1. **Thrive Amid Change** – Our keynote speaker [Ryan Estis](#) emphasized this to attendees. **Ewelina A. Caplap** with Coastal Credit Union said, “One of my primary takeaways from Estis was that there is no time to fall behind. You have to be one step ahead, open to change, and always innovative.” Regardless of changes in the industry, it’s important that your actions are: planned, purposeful, and a part of a process.
2. **Embrace New Practices** – External changes mean you have to change how you do business. Attendees gained insight on many new CFS/SPF tools including: the Wealth Advisor model for mature advisors working outside of branches; details and demos on our new “3-2-1” trainings which provide repeatable processes for advisors; demos of our newly enhanced Product Mix Transition Calculator; and introductions to our new Practice Management Group. Email [practicehelp@cusonet.com](mailto:practicehelp@cusonet.com) for more info.
3. **Incorporate Technology** – CFS/SPF and integrated technologies were one of the biggest highlights of the conference. Attendees learned more about FireLight, MoneyGuidePro, Albridge, BuildMyProfile™, e-Signature, and the newly launched [Program Marketing Center](#). **Kristin Chim** with SouthMetro Wealth Management said, “My takeaway was to start using MoneyGuidePro and the CFS/SPF BuildMyProfile information gathering tool, which I did immediately! My next step is to work on the 3-2-1 process.” Another advisor said, “I intend to experiment with Webinars (especially with our Millennial CU members), strategies for advisor business plans from the Program Marketing Center, LinkedIn pages for referral business, and much more.”
4. **Be Ready for Future Products** – Attendees also got sneak peeks into future CFS/SPF products such as fundVISION™, our mutual fund trading platform, PlanMyPortfolio, our digital advice solution, and premierVISION, our full-service advisory platform. Look for more details in coming months!
5. **Rely on the CFS/SPF Home Office** – Remember the subject matter experts in the home office are always here to help you succeed. **Len Cannon** with Workers’ Credit Union said, “This month was my best production month ever and I could not have done it without the help of all those at CFS/SPF. It is my great privilege to work with your great organization. There’s a sense of family here that I’ve never seen at other firms. Thank you!”
6. **Join us Next Year!** August 5-8, 2018 at the Manchester Grand Hyatt Hotel!

**There were so many fantastic takeaways from the conference, and we hope all of our attendees got a lot of value out of it. We look forward to seeing you next year on August 5-8, 2018!**