



# 2025-26

1

Gain practical guidance from other leading CEOs.

2

Learn from the world's most innovative thought leaders.

3

Build trusted relationships with your *true* peers.

4

Recharge & get away from everyday distractions in a resort-style retreat.

You are cordially invited by your peers to join the nation's top credit union CEOs as a member of the



Congratulations Dennis Sullivan!

You are one of only a select few who have been invited to join the nation's top credit union CEOs at a series of 2-day retreats to meet with other innovative thought leaders and share best practices with your peers.

The CEO 40 Group is available only by invitation from other CEOs who specifically requested that you join them. You have been invited because you have demonstrated a record of success at your credit union as well as a desire to learn and grow from others.

Brought to you by the creators of the CU Leadership Convention, the CEO 40 Group is unlike any conference or retreat you might have experienced. Meetings are held 3 times

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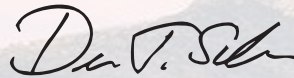
over a 12-month period in an executive resort-style retreat designed to remove you from everyday distractions and expand your thinking. You will have an opportunity to discuss the most pressing issues with other CEOs and hear from some of the world's leading authorities on today's hottest topics. You also have an opportunity to develop trusted relationships with other like-minded credit union leaders who truly understand the challenges you face.

As CEOs continue to experience unprecedented challenges, the need to learn from each other, share best practices, and meet with like-minded leaders is more important than ever before.

Some CEOs in attendance will be familiar names who always seem to be leading new paths and others are rising stars who you may have never met before. All plan to come together to learn, share and inspire each other in this small, intimate group setting.

On behalf of your colleagues, I invite you to take advantage of this exclusive invitation to join your true peers and become a member of the CEO 40 Group.

Yours truly,



Dennis J. Sullivan, Founder and CEO  
CEO 40 Group

## Meeting Schedule

**AUG 12-15, 2025** **CU Leadership Convention, Las Vegas**  
(complimentary with your membership)

**OCT 2-3, 2025** **ADERO Scottsdale Resort**

**FEB 5-6, 2026** **Park Hyatt Aviara Resort, Golf Club, and Spa**  
(see final page for details)

**APR 30-MAY 1, 2026** **Omni Interlocken Hotel**  
(see final page for details)

**OCT 1-2, 2026** **Noelle, Nashville, TN**



# Top 5 Reasons to join the CEO 40 Group

1

## Gain valuable perspectives from a trusted group of peers.

By joining a confidential, peer-advisory group, you get a rare opportunity to work with a small group of high-caliber CEOs from non-competing credit unions. These peers help you evaluate solutions in ways your staff and board cannot.

2

## Learn from thought leaders and facilitators who challenge your thinking.

Experienced CEOs understand that in order to grow, you need world-class thought leaders to spark innovation and activate new ideas to develop you personally, as well as your organization.



3

## Leverage insightful data and research from the country's leading CUs.

Each meeting you will have an opportunity to benchmark your organization against your peers – not based on just asset size, but based on those you truly wish to emulate – so you can see firsthand what's working, and what's not.

4

## Turn ideas into action with professional facilitators and supportive peers.

Ideas are useless without action. Working with credit union focused facilitators you will take home an action plan to turn your ideas into meaningful actions that will impact your CU for years to come.

5

## Share, motivate, inspire.

Relax, unwind at a top-tier resort destination and come together for this VIP meeting 3 times a year to access the experience, wisdom and insights of other growth-minded achievers. This is a chance to re-charge and gain practical guidance not available anywhere else.

### Thanks to our Sponsorship Partner



Nymbus provides a cloud-based platform tailored for credit unions, supporting brick-and-mortar operations and digital-first financial institutions. Our platform caters to various client needs, from DIY builders who require flexibility in customization to turn-key buyers looking for ready-to-use solutions.

Focused on the U.S. market, our dedicated

research and development efforts enable us to introduce more integrated and faster feature developments. We leverage the world's largest public cloud for reliable hosting and effective disaster recovery, ensuring operational continuity and security.

Our unified platform ensures that key banking experiences and technologies work

together smoothly, making transitions and daily operations efficient. Nymbus offers cost-saving features at no additional cost and operational support, allowing our clients to achieve their strategic objectives with predictable timelines and reduced risk, streamlining their path to modernization and growth.

# About our next meeting

Date: **October 2-3, 2025**

Location: **The Ritz-Carlton Orlando,  
Grande Lakes, FL**

4012 Central Florida Parkway,  
Orlando, FL 32837-7662



## About Your Meeting Speakers & Facilitators



### MICAH JINDAL

Micah Jindal is a leader in the Financial Institutions and Insurance Practices for Boston Consulting Group (BCG). In 22+ years of consulting, he has served 20+ banks and credit unions ranging in size

of \$1B to \$250B in assets, and specific lines of business across retail banking, consumer lending, wealth management, and small business/commercial banking. His expertise with these institutions has focused on growth strategies, customer journeys and omni-channel experience, digital transformation, and efficiency programs. Most recently, he has been supported multiple banks and credit unions with differentiation in the context of changes in technology and AI. Micah earned his M.B.A. from Harvard Business School. He graduated magna cum laude from Northwestern University, with a BS in Education & Social Policy, secondary major in Economics.



### JEFF DISTERHOFT, MBA

Jeffrey Disterhoft, former CEO of GreenState Credit Union, served from October 1999 to September 2023, transforming the institution into Iowa's largest independent financial entity. Under his leadership,

GreenState grew from \$200 million to over \$11 billion in assets, serving over 450,000 members across Iowa and Illinois with 30 locations.



### DENNIS SULLIVAN, MBA

Dennis is an experienced executive, entrepreneur, professor, and credit union advocate. He has launched or turned around more than 100 products and businesses and serves as Chairman of CU

Leadership Convention. He was recently named one of the world's top business professors specializing in marketing and served as professor at Johns Hopkins University. He currently serves as professor at the Community College of Baltimore County and on the faculty of Goldman Sachs 10,000 Small Businesses.

## KEYNOTE PRESENTATION

### Digital Transformation: Challenges & Opportunities in a New Era of Banking

**Speaker: Micah Jindal, Managing Director & Senior Partner,  
Boston Consulting Group**

Credit Union member expectations are changing faster than ever. In the daily life of driving, eating and shopping, consumers have become accustomed to getting service through their channel of choice, in real-time, and in a personalized way. And this is being enabled by the accelerating pace of changes in technology and AI. In this environment, how should credit unions adapt? Micah Jindal, a Senior Partner and Managing Director at BCG, will share his learnings from digital transformations undertaken by credit unions and regional banks. In this session, we'll discuss what are "must-haves" in a digital world, how to maintain what's core to the credit union mission when transforming, and key success factors to turn your vision into action.



# Event Schedule

October 2 | 2025

## THURSDAY

(Members and plus 1 are welcome to attend this evening's events.)

5:30 - 6:15 PM • COCKTAIL RECEPTION

6:15 - 7:30 PM • DINNER

7:30 - 9:30 PM • STAR GAZING



October 3 | 2025

## FRIDAY

7:00 - 8:30 AM • BREAKFAST

Red Mountain Lawn

8:00 - 8:30 AM

Registration: Red Mountain AB

8:30 - 9:45 AM

Introductory remarks: Dennis Sullivan

Opening Keynote - Digital Transformation: Challenges & Opportunities in a New Era of Banking

Micah Jindal, Managing Partner  
(Presentation & Q&A)

9:45 - 10:30 AM

Applying Digital Transformation Strategies to Your Shop

Lead Facilitator: Jeff Disterhoft, CEO (ret.),  
GreenState CU

10:30 - 10:45 AM • BREAK

10:45 AM - NOON

Roundtable Discussions on the Top 3 Hot Topics facing CUs

NOON - 1:00 PM • LUNCH

1:00 - 2:00 PM

Deep Strategic Thinking on the #1 Challenge Facing Your CU

Lead Facilitator: Jeff Disterhoft, CEO (ret.),  
GreenState CU

2:15 - 3:00 PM

Roundtable Discussion on Current Challenges & Solutions

3:00 - 3:30 PM

Turning Ideas into Action: Practical Steps for Implementing your Take-Home Plans

Sponsorship Partners:



# Venue

## Discover a whole new view at ADERO Scottsdale Resort!

### ABOVE THE DESERT, BENEATH THE STARS

ADERO Scottsdale Resort, perched high above the Sonoran Desert, is the only Autograph Collection® destination in a certified Dark Sky Community. The AAA Four Diamond Resort was also named to the prestigious T + L "It List" and Condé Nast Traveler's "Hot List" for 2021.

An idyllic setting for intimate gatherings, ADERO offers guests endless opportunities to indulge in the great outdoors. An elevated escape with a world-class fitness club, deeply restorative wellness experience at The Spa at ADERO, farm-to-table cuisine, a poolside oasis, on-site trailheads for hikes and mountain biking, access to the neighboring Sunridge Canyon Golf Club, nightly stargazing and more, ADERO invigorates the mind and stirs the spirit for getaways that are true adventures for the soul.



### Members receive the following guest benefits:

- Two reusable water bottles per room
- Welcome drink upon arrival for up to two people per room
- Daily Two hours of equipment and court use of tennis or pickle ball for each registered guest
- Daily morning self-guided desert hike for each registered guest with availability of trail maps and accessories for hiking, walking, biking for each registered guest
- Daily \$10 Spa Credit per room
- Daily Two hours daily instructor lead sessions in fitness studio (for up to two people)
- Lawn games available on lawns
- Shuttle Service to trail head and 2.5-mile radius for registered guests
- Daily Peloton studio classes for up to two people

#### Price:

- CEO 40 Group Discounted Rate is \$329/night  
\$20 daily resort fee. Check-in: 4:00 pm.
- Cut-off Date: September 2, 2025



# Your Membership Includes:



- All-inclusive registration to **three CEO 40 Group meetings over 12 months.**
- **Private, small-group meeting with other CEOs** based on asset size — \$500M - \$1B AUM and \$1B+ AUM.
- **Complete access to all meetings** with speakers, roundtable meetings, and networking receptions.
- **One complimentary guest pass** to the opening-night dinner & reception.
- **Exclusive access to member research data & analytics** so you can benchmark your CU against the leaders in the movement.
- **Discounted room rates** to some of the country's most luxurious resorts.
- **Available discounts for resort activities** such as spa, fitness facilities, tennis, pickle ball, golf and much more.
- **Complimentary all-access registration to the CU Leadership Convention** held every summer in Las Vegas.

# Annual Membership Pricing:

Membership includes registration to three CEO 40 Group Meetings over 12 months, one guest pass for the opening night reception, continental breakfast and lunch the day of the meetings, research data, networking events and complimentary registration to the CU Leadership Convention in Las Vegas. Membership is unique to you and is not transferrable. Substitutes are not permitted.

SAVE \$2,500 this year only with our inaugural discount offer!

	Regular Price	Inaugural Member Rate
CEO \$1B+ AUM	<del>\$20,000</del> (SAVE \$2,500)	\$17,500
CEO \$500M - \$1B AUM	<del>\$15,000</del> (SAVE \$2,500)	\$12,500

Contact Dennis Sullivan to become a member today!

Phone: 410-804-5643 • Email: [Dsullivan@CEO40Group.com](mailto:Dsullivan@CEO40Group.com)





# A one-of-a-kind, small-group experience

**CEO 40 Group is for credit union CEOs who want to learn from the world's leading thought leaders and gain practical guidance from their true peers.**

## OUR MISSION

Our mission is to equip forward-thinking, growth-minded CEOs with the knowledge and skills they need to better serve their employees, their members and their communities as stewards of the credit union philosophy of "people helping people."

## OUR VISION

Our vision is to be a world-class executive leadership resource delivering exceptional value so CEOs can in turn build long-term value for all stakeholders and ultimately create better communities in which they work, live and play.

## OUR VALUES

- Love one another. Treat everyone with love, respect and dignity just as you would want from them.
- Make a difference in the lives of others. Seek opportunities to lift-up others.
- Be passionate and determined. Pursue goals with zeal and persistence.
- Be good stewards. Take care of the resources, time, and talents that have been entrusted to you.
- Be humble. Put others before yourself and recognize the contributions of others.
- Have fun. Take time to enjoy family, friends, and the life and world we have. Life is short.



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**Thanks to our Sponsorship Partner**



Earnest Consulting Group partners with boards and senior management to develop strategies that reward and retain key executives, offset employee benefit costs, and enhance charitable giving opportunities. As your strategic resource, we infuse deep industry knowledge with flexible, creative thinking to deliver prompt, bespoke solutions that adapt seamlessly to changing market conditions and your long-term needs.



# CEO 40 Group members include...



## Thanks to our Sponsorship Partner



SRM is an independent advisory firm focused on payments, sourcing, operating strategies, and technology for clients ranging from community financial institutions to global financial services leaders. SRM has partnered on strategic initiatives with 1,000+ clients and returned more than \$10 billion in value in the process. More than just consultants, SRM delivers a full-circle experience with the addition of unmatched core technology implementation experts and project management services. SRM provides trusted, data-driven, unbiased advice and continues to expand services based on client feedback and critical needs.



# Keynote Presentation



**RYAN HOLIDAY**

Since best-selling author Ryan Holiday introduced Stoicism to the world with *The Obstacle Is the Way*, this simple but powerful philosophy for life has taken the world by storm. This brilliant and engaging book is an invaluable source of wisdom for anyone who wants to become more successful at what they do. The New England Patriots and the Seattle Seahawks invited Ryan to visit their headquarters to talk about the ideas in the book. NBA all-star Chris Bosh listed the book as an item "he couldn't live without." In addition, other books like *Ego Is the Enemy*, *The Daily Stoic*, and the #1 New York Times bestseller *Stillness Is the Key* appear in more than 40 languages and have sold more than 5 million copies. Together, they've spent over 300 weeks on the bestseller lists. Ryan lives outside Austin with his wife and two boys...and a small herd of cows and donkeys and goats. His bookstore, *The Painted Porch*, sits on historic Main St in Bastrop, Texas.

February 5-6, 2026 San Diego

Park Hyatt Aviara Resort, Golf Club & Spa

## The Obstacle is the Way

**Speaker:** Ryan Holiday, Best-Selling Author & Philosopher

As one of the world's best-selling living philosophers, Ryan Holiday delves into the wisdom of history's greatest figures and how they used obstacles as the stepping stones to success. From ancient philosophers to modern-day business leaders, he shares examples of how embracing the challenges that stand in our way can help us achieve our goals. He'll show how to turn setbacks into opportunities, how to use adversity to your advantage, and how to find hidden opportunities in every obstacle. By the end of this talk, CEOs will have a new perspective on the challenges they face and be equipped with practical strategies to overcome them, using adversity as a strategic advantage in today's competitive landscape. It's time to stop seeing obstacles as roadblocks and start seeing them as the path to success.

# Keynote Presentation



**MARCUS COLLINS, PH.D.**

Dr. Marcus Collins is an award-winning marketer and cultural translator. He is the former chief strategy officer at Wieden+Kennedy, New York, a professor at the Ross School of Business, University of Michigan, and the author of the best-selling book, *For The Culture: The Power Behind What We Buy, What We Do, and Who We Want To Be*. Marcus is an inductee into the American Advertising Federation's Advertising Hall of Achievement and a recipient of the Thinkers50 Radar Distinguished Achievement Award for the idea most likely to shape the future of business management. His strategies and creative contributions have led to the launch and success of Google's "Real Tone" technology, the "Made In America" music festival, and the Brooklyn Nets, among others. Before his advertising tenure, Marcus worked on iTunes + Nike sport music initiatives at Apple and ran digital strategy for Beyoncé. He writes a column for Forbes CMO Network and contributes to business scholarship.

April 30 – May 1, 2026 Denver, CO

Omni Interlocken Hotel

## For The Culture: The Power Behind What We Buy, What We Do, And Who We Want To Be

**Speaker:** Marcus Collins, Ph.D., Best-Selling Author & cultural translator

There is no external force more influential to human behavior than culture—full stop. This makes culture a cheat code for CEOs with a vested interest in getting people to adopt the behavior. Those who understand the dynamics of culture are more likely to have influence, while those who do not are almost always influenced by those who do. In this talk, Marcus pulls from both theory and practice—using learnings from his work spearheading digital strategy for Beyoncé to working with Fortune 500 companies like Apple, McDonald's, and Google—to break down the ways in which culture influences behavior and unpacks how to leverage its power to get people to move. Professor in Residence at TikTok, Best-Selling Author, 2023 Thinkers50 Radar Award Winner, Award-Winning Marketer, Marshall Goldsmith 100 Coach, and University of Michigan Professor, Marcus is the recognized authority on leveraging the power of culture to influence behavior, inspire collective change, get people to share your vision, and most importantly, move them to take action.