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FLORIDA ADVOCACY CONFERENCE



3/28/23 - 3/29/23 Tallahassee, FL

Tuesday, March 28

10:00 AM - 10:30 AM

Registration

Falls Edge

Registration Break Sponsored by 

**All morning sessions & lunch will be in Cascades III, IV & V*

10:30 AM - 10:45 AM

Welcome and Update from the League of Southeastern Credit Unions

Samantha Beeler, President, LSCU & Affiliates



10:45 AM - 11:15 AM

2023 State Legislature: Environment, People and Issues Important to Credit Unions

John Rothell, Senior Director of Governmental Affairs (FL), LSCU & Affiliates



11:15 AM - 11:30 AM

Our Efforts on Capitol Hill - Federal Political Update

Grace Newcombe, Senior Director of Federal Advocacy and Communications, LSCU & Affiliates



11:30 AM - 11:45 AM

Break

11:45 AM - 12:00 PM

2022 LSCU & Affiliates State Lawmaker of the Year Presentation

Senator Blaise Ingoglia (R-Hernando), Commerce Chair, Florida State Senate



12:00 PM - 1:00 PM

Luncheon: 2022 PAC Awards Presentation

John Rothell, Senior Director of Governmental Affairs (FL), LSCU & Affiliates



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1:00 PM - 1:15 PM

Grassroots Mobilization: Legislative Priorities & The Importance of Engagement

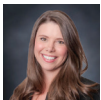
Mat Willey, Deputy Director of Grassroots Advocacy, LSCU & Affiliates



1:15 PM - 1:30 PM

Public Deposits: A Real-Time Update From the Florida Capitol

Samantha Beeler, President, LSCU & Affiliates



1:30 PM – 5:30 PM

Legislative Meetings

Florida Capitol – 400 S Monroe St, Tallahassee, FL 32399

5:30 PM – 7:30 PM

Lawmaker Reception

Governor’s Club
202 South Adams Street
Tallahassee, FL 32301

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7:30 PM

Dinner on your own

Wednesday, March 29

8:00 AM – 9:00 AM

Breakfast

Cascades I & II

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9:00 AM – 9:45 AM

Politically Florida: Post-2022 Election Analysis and What to Expect



Andrew Wiggins, Senior Director, Political Affairs & Coalitions Advocacy,
Florida Chamber of Commerce

9:45 AM - 10:00 AM

The Freshman Perspective of the Florida Senate



State Senator Corey Simon (R-Tallahassee)

10:00 AM – 10:15 AM

Break

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10:15 AM - 10:30 AM

Tackling Tough Issues in the Florida Senate



State Senator Danny Burgess (R-Zephyrhills)
Supervisory Committee Member, San Antonio Citizens Federal Credit Union

10:30 AM - 10:45 AM

Florida House Priorities 2023



State Representative Mike Beltran (R-Valrico)

10:45 AM – 11:00 AM

2023 Priorities of the Florida Office of Financial Regulation



Russell Weigel, Commissioner, Florida Office of Financial Regulation

11:00 AM - 12:30 PM

Regulator Roundtable: What Credit Unions Can Expect from Examinations and the Florida Office of Financial Regulation



Bill Berg, VP, Compliance, Training and Information, LSCU & Affiliates

Ben Brinkley, Chief of Credit Union Regulation, Florida Office of Financial Regulation

12:30 PM

Adjourn

2023 Credit Union Legislative Issues

PUBLIC DEPOSITS

- The Federal Credit Union Act (FCUA) authorizes all federal chartered credit unions to accept public deposits, but Florida law does not grant state governmental entities the authority to deposit funds in either federally chartered and/or state-chartered credit unions. Currently, 33 states have some sort of public deposit authority for credit unions. Expanding public deposits authority to credit unions would spur competition and lead to public entities earning more income on their decreasing deposits of public funds.
- LSCU asks legislators to support the passage of **House Bill 987 by Representative Adam Botana and Senate Bill 1360 by Senator Blaise Ingoglia**. HB 987 has passed the House Insurance and Banking Subcommittee and is awaiting a hearing in the House State Administration & Technology Appropriations Subcommittee. SB 1360 is awaiting a hearing in the Senate Committee on Banking and Insurance.

INTERCHANGE FEES

- Recently, there has been a significant federal effort to regulate interchange fees. Financial institutions remain responsible for fraud and data security losses that stem from breaches caused by retailers that do not secure their payment data. Interchange fees cover the cost of fraud detection, credit monitoring, fraudulent purchase protection, and more. State-level legislation has been introduced in the past, prohibiting card-issuing financial institutions from charging interchange fees on the sales tax portion of a retail transaction.
- The LSCU opposes legislation that alters credit card interchange fees. Instead, the LSCU encourages data security legislation that protects consumer data and encourages merchants to accept more transaction liability. Please ask legislators to **oppose House Bill 677 by Representative Mike Caruso and Senate Bill 564 by Senator Travis Hutson**.

PACE LOAN PROGRAM

- In 2010, the Legislature approved the use of Property Assessed Clean Energy (PACE) loans for use to improve homes for energy efficiency and wind resistance. A property owner could borrow money up front to do the improvements and a lien is recorded upon the property and paid off through increased property assessments. **These liens then take priority over the mortgage, due to it being a tax lien.**
- This year's bill changes the name to the Resiliency Energy Efficient Florida program (REEF). It would add consumer protections, including underwriting and income requirements, credit checks, financing estimate disclosures and several other protections to ensure consumers understand the process of repayment and are able to fulfil these requirements.
- While LSCU continues to oppose this program due to the lien priority over the mortgage, we do support the proposed consumer protections in these bills. **Support House Bill 669 by Representative Randy Fine and Senate Bill 950 by Senator Ana Maria Rodriguez** – so long as they do not expand the program to support other improvements such as septic-to-sewer conversions, sea wall repair or expansion, etc.

Notes

Speakers

Samantha Beeler, *President, LSCU & Affiliates*



Samantha Beeler serves as President of the LSCU & Affiliates. She previously served as Vice President of Advocacy for the now GoWest Credit Union Association which is the regional trade association for credit unions. In her role, Samantha is responsible for advocacy, compliance, legal and member engagement. Prior to working for the NWCUA, she led communications for a Government Contracts Practice group in Washington, D.C. Samantha grew up in Alabama and lived in Georgia. Samantha received her bachelor's degree in Social Science from Washington State University and also did an emersion program in International Relations at Peking University in Beijing, China. She received her Executive Education at Harvard's Kennedy School of Government. Samantha and her husband Garrett, who is a member of U.S. Special Forces, have three daughters Aryan (7 yrs. old), Alanna (4 yrs. old) and Adaire (1 yrs. old).

Mike Beltran, *Florida State Representative (R-Valrico)*



Rep. Mike Beltran was born in New York City, NY. He attended the University of Pennsylvania and graduated in 2005 with a B.A. with honors in International Relations, magna cum laude. He then went on to earn his Law Degree from Harvard Law School in 2008 before moving to Florida in 2010 where he served as a law clerk to a Federal District Judge. He is still a practicing attorney by trade, and he is happily married to his wife Hope. The couple have two young sons, Michael and Ross. Mike is also an Eagle Scout and takes pride in this formative experience he had growing up. He has been recognized as a Outstanding Young Florida Lawyer and has been appointed by Governors Rick Scott and Ron DeSantis to the Judicial Nominating Commission for Florida's Thirteenth Circuit Court in Hillsborough County. Mike was first elected to the Florida House in 2018 and was re-elected subsequently in 2020 and 2022. Mike is a passionate fighter in the courtroom and in the legislature for the causes he believes in and is grateful to his constituents for the opportunity to serve.

Bill Berg, *VP of Compliance Training and Information, LSCU & Affiliates*



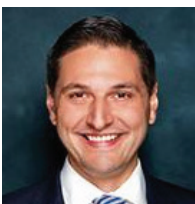
Bill Berg has been with the League of Southeastern Credit Unions (formerly the Florida Credit Union League) since 1988 and currently serves as the vice president of compliance training and information. In this position, Bill answers technical/regulatory questions; provides customized training to credit unions, chapters, and other groups; and facilitates planning sessions for credit unions. Bill was one of the principal authors of League InfoSight and is the editor of the bankruptcy and collections and security channels. Prior to joining the LSCU, Bill worked for eleven years for the Federal Reserve of Atlanta - Jacksonville Branch.

Ben Brinkley, *Chief, Bureau of Credit Union Regulation, Florida Office of Financial Regulation*



Ben Brinkley joined the Florida Office of Financial Regulation in July 2005. He started as a field examiner in the Jacksonville area office. He has held various positions in both the Bank Bureau and the Credit Union Bureau. In September 2019, he was promoted to Bureau Chief of Credit Unions. Before joining the Office of Financial Regulation, he worked as a loan officer in the Jacksonville office of Washington Mutual. Ben graduated from Georgia Southern University in 1998, and the Florida School of Banking in 2012.

Danny Burgess, *Florida State Senator (R-Zephyrhills), Supervisory Committee Member, San Antonio Citizens Federal Credit Union*



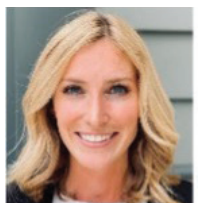
A life-long resident of Pasco County, Danny was elected in 2020 to represent District 20 in the Florida Senate. He currently chairs the Senate Judiciary Committee and has previously served as Chair of the Select Committee on Pandemic Preparedness and Response as well as the Chair of the 2022 Senate Legislative Redistricting Committee. No stranger to difficult issues and heavy workloads, Danny fights tirelessly for his legislation and his District. During the 2022 Legislative Session, Danny was able to pass 17 pieces of legislation that were then signed into law by Governor DeSantis, the most of any member in the legislature. He is an attorney by trade and is a Partner at the law firm of Shumaker, Loop and Kendrick, LLP, and prides himself on being more than just a lawyer; he is also a father, husband, soldier, and public servant.

Senator Blaise Ingoglia, Florida State Senator, Commerce Chair (R-Hernando)



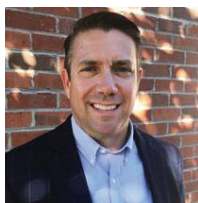
Blaise Ingoglia is a small business owner and conservative champion who is not afraid to take on the establishment and fight for our families. First elected to the Florida House in 2014, Blaise quickly established himself as a conservative leader. Today, he serves as Chairman of the House Commerce Committee. In the House, Blaise maintained his commitment to conservative principles, standing strong against tax increases, illegal immigration, and efforts to weaken our Second Amendment rights. He spearheaded key legislation through the House to protect Florida's water resources, create jobs by removing onerous regulation, protect Florida's elections from fraud, and stop Big Tech from silencing our voices.

Grace Newcombe, Senior Director of Federal Advocacy & Communications, LSCU & Affiliates



Grace Newcombe joined the League of Southeastern Credit Unions & Affiliates in 2021 as the Sr. Director of Federal Advocacy and Communications, where she serves credit unions in Alabama, Florida, and Georgia. Grace came to the League after serving as the Director of Communications and Governmental Relations for the Alabama Secretary of State's Office. She graduated with a degree in Political Science and English from the University of South Alabama, where she also served as President of the Student Body.

John Rothell, Senior Director of Governmental Affairs (FL), LSCU & Affiliates



John is responsible for the coordination of Legislative Affairs in the State of Florida, including research and analysis of bills, direct lobbying of the Florida Legislature, and interviewing and vetting legislative candidates for support from Florida CUPAC. He assists in political fundraising efforts, and promotes LSCU's Advocacy Agenda with credit unions throughout Florida. John is a graduate of Florida State University, where he received his Bachelors of Science Degree in Political Science, and has been with the League since mid-December, 2018. His previous employment included the Florida Senate, Florida Institute of CPAs, and 13 years as the Political Director for the Florida Association of Realtors.

Corey Simon, Florida State Senator (R-Tallahassee)



Corey Simon is a resident of Tallahassee, a former professional football player and current president of the Big Bend Pop Warner football league. He attended high school in Pompano Beach before attending Florida State University on a football scholarship where he was a consensus All-American his senior year and helped the Seminoles to the 1999 BCS National Championship. The Philadelphia Eagles then selected Simon with the 6th overall pick in the 2000 NFL Draft. He would go on to amass 246 career tackles, 32 sacks and 9 forced fumbles over eight seasons with Philadelphia, Indianapolis and Tennessee. Following his time in the NFL, he shifted his focus to philanthropic work and started Corey's Kids, an organization which focused on mentoring children in North Florida's foster care system. He has also partnered with Big Bend Community Based Care for mentoring and coached high school football at Maclay School while being actively involved with Engage Church in Tallahassee. Simon earned his bachelor's degree in information studies from Florida State University.

Russell Weigel, Commissioner, Florida Office of Financial Regulation



Commissioner Weigel is an AV-rated securities attorney, with more than 30 years of legal experience, and a published author. In 2005, he founded a securities transactional and litigation law firm, which he ran until he became commissioner in March 2020. Prior to that, he served as a securities and transactional and litigation attorney in the private sector. He was also an enforcement attorney with the U.S. Securities and Exchange Commission and an assistant state attorney for the Office of the State Attorney, Tenth Judicial Circuit. He holds an undergraduate degree in economics from Vanderbilt University and a Juris Doctor from the University of Miami School of Law.

Speakers (cont.)

Andrew Wiggins, *Senior Director, Political Affairs & Coalitions Advocacy, Florida Chamber of Commerce*



As the Senior Director, Political Affairs & Coalitions Advocacy for the Florida Chamber of Commerce, Andrew Wiggins manages the Florida Chamber's political campaign activity as well as build coalitions and works with local chambers of commerce throughout the state of Florida. Prior to joining the Florida Chamber, Wiggins served as the Deputy Director of Senate Campaigns at the Republican Party of Florida, where he previously spent three years working for House Campaigns.

Mat Willey, *Deputy Director of Grassroots Advocacy. LSCU & Affiliates*



Mat has an extensive campaign and grassroots background and recently managed a Senate campaign in Iowa. His experience in grassroots advocacy includes work on a statewide initiative, stints on both a U.S. Congressional and U.S. Senate race, and two nationwide campaigns. Before this, Mat spent more than seven years working throughout the Southeast in marketing, communications, and sales. Outside of work, Mat enjoys hanging out with his son, spending time outdoors, and watching St. Louis Blues hockey.

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Attendees

Charles Adcock	President/CEO	Florida State University CU
Timothy Antonition	President and CEO	Space Coast Credit Union
Matt Brockelman	Vice President, Government Affairs	VyStar Credit Union
Park Broome	Chief Strategy Officer	Central Credit Union Of Florida
Lisa Brown	President/CEO	Central Credit Union Of Florida
Shelly Burns	CLO	Calhoun Liberty Credit Union
Elizabeth Chavez	EVP	Florida West Coast Credit Union
Andrew Diloreto	Board Member	Orlando Credit Union
Jennifer Durden	EVP/CFO	FSU Credit Union
Michelle Evers	Branch Supervisor	Okaloosa County Teachers FCU
Thomas Flowers	CEO	Calhoun Liberty Credit Union
Wayland Fulford	Senior Vice President/Chief Lending Officer	Community South Credit Union - Chipley, FL
Danny Gilman	Board Of Director, Chair	Central Credit Union Of Florida
Tracey Golay	Board Of Directors	Central Credit Union Of Florida
Caryl Greene	President/CEO	Members First Credit Union Of FL
John Heckmann	VP Of Strategy & Investments	Pen Air Credit Union
William Hennessey	Board Of Directors	Brightstar Credit Union
David Hill	CIO	Community Credit Union Of Florida
Justin Hof	CIO	First Commerce Credit Union
Cecilia Homison	Chief Executive Officer	First Commerce Credit Union
Willie Howard	Board Member	Space Coast Credit Union
Cathy Hufstetler	SVP Lending	121 Financial Credit Union
Nick Lazenko	Member Service Officer	City County Employees Credit Union
Aaron Logue	CEO	City & Police Federal Credit Union
Hollie Maddox	COO	Envision CU
Sam Mahler	Director Of Government & Industry Relations	Federal Home Loan Bank Atlanta
David Marovich	President & CEO	121 Financial Credit Union
Patrick Mason	President/CEO	Sun Credit Union
Kevin McKeown	Board Member	Space Coast Credit Union
Scott McKim	CSO	121 Financial Credit Union
Eugene McNease	Board Chair	Envision Credit Union
Bobby Michael	President/CEO	All In Credit Union
Kenny Ray Mitchell	FL Northern Panhandle Region Market Leader	Innovations Financial CU
Tom Myers	Board Chair	Space Coast Credit Union
Eric Nystrom	President/CEO	My Healthcare Federal Credit Union
Elizabeth Oakes	Chief Operations Officer	Central Credit Union Of Florida
John Oertel	Board Member	Space Coast Credit Union
Jan Page	President/CEO	Community South Credit Union
Michael Parks	SVP CIO	Suncoast Credit Union
Jimmy Peluso	Government Affairs Manager	Vystar Credit Union
Donna Powell	Vice President Branch Operations	First Florida Credit Union
Melanie Quinton	Vp Marketing	Central Credit Union Of Florida
Patricia Sarne	President/CEO	San Antonio Citizens FCU
Beverly Smith	Vice President, Retail Services	Space Coast Credit Union
Alonzo Swann	Credit Union Strategist	Federal Home Loan Bank Atlanta
John Vogel	Supervisory Committee Chair	San Antonio Citizens FCU
Terri Waldron	COO	Calhoun Liberty Credit Union
Suzanne Weinstein	President & CEO	Orlando Credit Union
Michele Williams	Executive Vice President/COO	Members First Credit Union Of FL
Terry Wood	SVP HR	Suncoast Credit Union
Darryl Worrell	President/CEO	Envision Credit Union

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YPG Attendees

Grant Abbott
Jamie Affeld
Daniel Anderson
Alex Ayala
Charlotte Cruz Pumarejo
Denelle Miller
Michael Poucher

VP Lending and Administration
Card Services Product Manager
Human Resources Manager
Member Advocate
Sr Loan Analysts
CEO
VP Of Operations

FSU Credit Union
Fairwinds Credit Union
Eglin Federal Credit Union
Suncoast Credit Union
Suncoast Credit Union
Ficare FCU
FSU Credit Union



Download the LSCU Events App
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Florida Advocacy Conference.



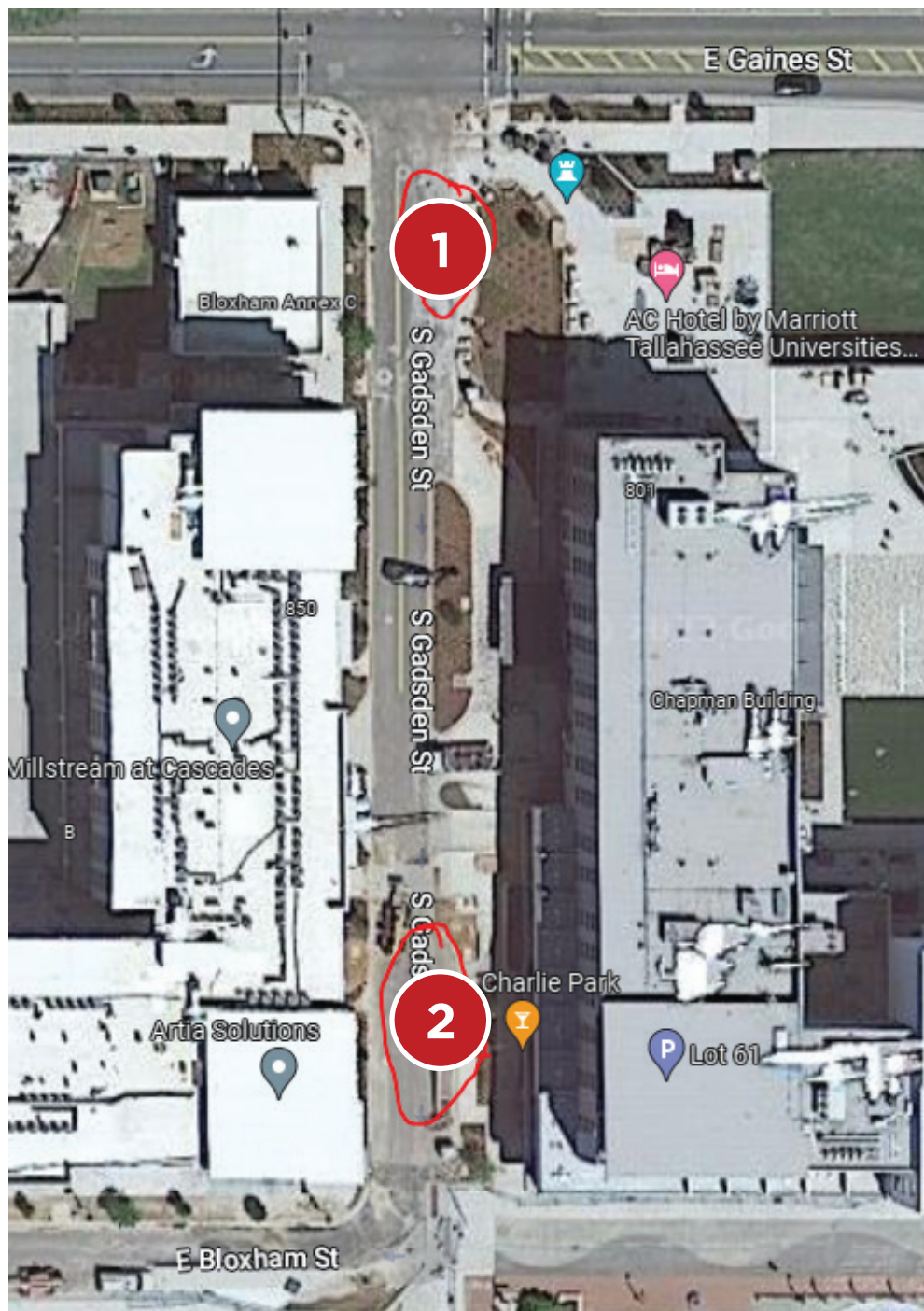
Shuttle Schedule:

Tuesday, March 28, 2023

1:00 PM - 5:00 PM - Shuttle will run on continuous loop from the hotel to the Capitol.

5:00 PM - 8:00 PM - Shuttle will run on a continuous loop to and from the hotel and Governors Club.

The shuttle will pick up and drop off at the 2 listed on the below map. This is a ride share area located just past the hotel entrance.





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Lawmaker of the Year - Senator Blaise Ingoglia (R-Hernando)



Serving as Chair of the Commerce Committee in the Senate, Senator Ingoglia was instrumental in the passage of public deposits through the House Insurance and Banking Subcommittee in 2022. Ingoglia was elected to the Senate in November, 2022 and will be a great asset to Florida's credit unions and nearly 7 million members. We look forward to a continued relationship and are appreciative of his friendship to credit unions. In 2023, he is the sponsor of Public Deposits (SB 1360) in the Senate, and Chairman of the Finance and Tax Committee.

LSCU Contact Information

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Upcoming Advocacy Events



Florida Credit Union Association Legislative Reception

March 28, 2023 | 5:30 PM - 7:30 PM

Governor's Club
202 South Adams Street
Tallahassee, FL 32301

