

QUARTERLY ACTION PLAN

SPOTLIGHT

BIG.BRIGHT.MINDS.

DECEMBER 1-3, 2026 | NEW ORLEANS, LA

What will happen at big.bright.minds. 2026? Original research you'll see nowhere else. Live access to the fintechs that credit unions are actually evaluating and deploying. Conversations that reframe how you think about your members, your balance sheet, and your competition. Relationships with credit union peers and the creation of a network that outlasts any one event.

2025 set the bar: 400+ leaders from nearly 180 organizations packed the room in Nashville for our largest big.bright.minds. ever and registration sold out.

2026 will be bigger.


[Register](#)

EVENTS & WEBINARS

Connect with industry leaders and thousands of your credit union peers, while exploring the hottest topics impacting the industry.

THIS QUARTER

7/18-7/22	Crash World Credit Union Conference 2026 Sydney, Australia	
8/2-8/6	Crash Defense Credit Union Council Conference 2026 Aventura, FL	
8/6	Personalization That Pays Off: How Credit Union CMOs Are Turning Smarter Segmentation into Deeper Relationships and Higher Balances	
8/18	Making the Credit Union Difference Impossible to Miss: Introducing Filene's New Research Center	

 IN-PERSON EVENT

 CRASH®

 WEBINAR

8/24-8/27	FiLab Symposium Kansas City, MO	INVITE ONLY	
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9/24	Financial Stress Is Rising, Are Your Members Feeling It? How Credit Unions Can Turn Financial Well-Being into Loyalty, Trust, and Growth	MEMBER EXCLUSIVE	
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NEXT QUARTER

12/1-12/3	big.bright.minds. New Orleans, LA	
12/1-12/3	Crash big.bright.minds. New Orleans, LA	

[Email the Membership Team](#)

Want to bring a friend to an event? Need a review of your organization's current benefits? Contact us!

All events and webinars are subject to change. Register at filene.org/events and get the most up-to-date information.



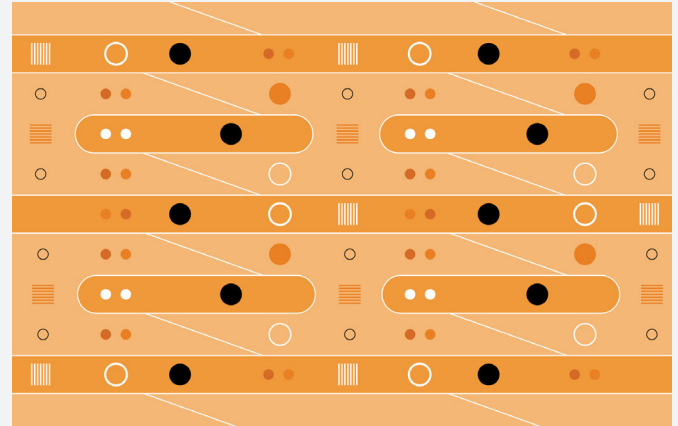
QUARTERLY INSIGHTS

SPOTLIGHT

AN AGENTIC AI PRIMER FOR CREDIT UNIONS

REPORT NO. 669

Agentic AI can do more than answer questions. It can plan, use tools, and carry out multi-step tasks, which makes it especially relevant for credit unions facing staffing pressure, rising digital expectations, and growing competition. This primer outlines the clearest opportunities, including member service, lending, fraud detection, compliance, financial wellness, collections, and back-office work. It also covers the risks that need careful oversight, including inaccurate outputs, fair lending concerns, security issues, and regulatory expectations. **The takeaway is practical: credit unions do not need to rush in, but they do need a plan.**


[Download the Research](#)

RESEARCH OUTPUTS

Increase learning and transform your organization with cutting-edge research addressing the credit union industry's most pressing challenges.

- COMMUNITY SOCIAL IMPACT
- CREDIT UNION OF THE FUTURE
- LEADERSHIP, STRATEGY & GOVERNANCE
- NEXT GENERATION OF MEMBER GROWTH
- DESIGN FOR DIGITAL
- MEMBER WELL-BEING

COMING THIS QUARTER

- Impact Report: Community Social Impact
- Growing Through Diversity: Using Data to Reach Young, Multicultural Members
- Credit Union Benchmarking Survey Results—Design for Digital
- Board Behavioral Assessment Comparison
- AI Readiness Guide
- Credit Union Benchmarking Survey Results—Member Well-Being
- Governance Approach Comparison

- Capstone—The Credit Union of the Future
- Employee Well-Being Case Studies
- The Future of Credit Union Leadership: Young Professionals
- Credit Union Product Maturity
- Broader Analytics Ecosystem
- Designing the Human Side of Digital Transformation

[Email the Membership Team](#)

Want to send your team the latest insights? Need a review of your organization's current benefits? Contact us!

Subscribe to our newsletter for the latest research!

