NACUSAC 2023 Annual Conference
Speaker Profiles

Wednesday, June 21

TIM HARRINGTON, CPA, CEO
TEAM RESOURCES

Author, consultant and international speaker, Tim Harrington has inspired credit unions for three decades to be excited about change and push the envelope. He has had to reinvent himself several times over his career, just has credit unions need to reinvent themselves today. Tim has managed a manufacturing plant, been a partner with one of the leading Credit Union audit firms in the US, and for the last forever, has been a speaker and consultant moving the credit union movement forward. Tim has worked with credit unions in all 50 states, Canada, Mexico, Austria, Jamaica, the Dominican Republic and the Virgin Islands. His progressive ideas and broad knowledge of credit union issues has made Tim a valuable resource for credit unions nationwide. Tim has spoken to hundreds of thousands of listeners are over 1,000 events and continues to inspire people to improve their organization…to make a difference in the world. Tim is CEO and Founder of TEAM Resources, a firm providing consulting, strategic planning, and training to credit unions from coast-to-coast. TEAM Resources' clients range from a few million to the billions in assets. Tim's has authored three books: Eisenhower on Enlightened Leadership; Living a Life that Matters: Into the Light; and A Credit Union Guide to Strategic Governance. His books are used by boards and management teams throughout the U.S.

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Thursday, June 22

MIKE RICHARDS, CPA, CEO
RICHARDS & ASSOCIATES

Mike Richards has held the position of CEO of Richards & Associates, CPAs for nearly forty years. He joined the firm in 1973 after earning a bachelors degree in business administration from the California State University at Los Angeles and becoming a Certified Public Accountant. In addition to managing the day-to-day operations of Richards & Associates, Mike has introduced many new services. He is responsible for quality control of all professional services offered by the firm.

OLIVIA WHIPPLE, OWNER & CO-FOUNDER
THE AUDIT LIBRARY

Olivia Whipple is an owner and co-founder at The Audit Library. She has over fifteen years of financial institution and audit industry experience and has served in both internal and external audit roles.

Olivia created many of the documents in the Library, which are the product of her industry knowledge as well as a lifelong passion for writing. As a business writer, Olivia also contributes to The Audit Library Blog, where she educates readers about auditing theory, professional practice, and the unique challenges and opportunities auditors experience. Olivia serves Credit Union clients as an assurance consultant, where her prior experience as a Chief Audit Executive provides first-hand perspective. Over the course of her career, Olivia has learned the value that Internal Audit brings to organizations, and created new ways to unlock the audit activity's potential by providing resources where they are needed most.

JOHN KANEKLIDES, OWNER & CO-FOUNDER
THE AUDIT LIBRARY

John Kaneklides is an owner and co-founder at The Audit Library. He has over a decade of financial institution and audit industry experience and has served in Internal Audit and consultant roles.

John has helped grow The Audit Library from an idea into a leading document subscription service and consulting firm with hundreds of clients. John is a contributor to the document Library and to The Audit Library Blog, where he educates readers about using their potential and available resources to maximize efficiency and effectiveness. John serves Credit Union clients as an assurance consultant, focusing on his passion for Quality Assurance Reviews, where his professional background brings a unique understanding of the challenges faced by Internal Auditors. He strives to provide practical advice and real-world solutions to benefit his clients. John regularly volunteers and performs speaking engagements for various industry organizations, and contributes to professional publications and podcasts.

BARRY PELAGATTI, CPA, PARTNER, AUDIT SERVICES GROUP RKL

For more than two decades, Barry Pelagatti has been a trusted business advisor to financial institutions throughout the Mid-Atlantic. His noteworthy reputation among this sector stems from his proactive and innovative approach to helping clients manage evolving challenges like cyber risk and regulatory compliance and improve operating efficiency.

As Partner in RKL's Audit Services Group and leader of its Financial Services Industry Group, Barry directs the strategy, growth and management of the firm's robust spectrum of solutions for banks, credit unions and other institutions, ranging from traditional assurance and tax services to cutting edge capabilities like data security assessments and business continuity planning.

Whether he is reviewing financial statements, completing a Sarbanes-Oxley filing or assisting with a capital market transaction, Barry is keenly focused on finding unique ways to build durable relationships with his clients and surpass their expectations.

As Managing Partner of RKL's Exton Office, Barry oversees the general operations for this location and leads the effort to expand the firm's visibility and impact in the Greater Philadelphia region. Barry's commitment to client service excellence is also underscored by his cultivation of the next generation of accounting and professional service leaders. Driven to find the best and highest use for each individual's talent and skillset, he is actively engaged in firm wide mentorship, recruitment and professional development initiatives.

LINDSEY BECKER, CRCM, SENIOR MANAGER DOEREN MAYHEW

Lindsey Becker is a Senior Internal Audit and Compliance Manager in the Financial Institutions Group at Doeren Mayhew.

With more than 20 years' experience, Lindsey helps compliance and internal audit clients identify risks and find solutions to related concerns. Well abreast of current trends affecting credit unions, community banks, mortgage companies and CUSOs in these compliance and internal audit segments, she researches and updates audit programs for clients of all sizes to meet the direct needs of their risk profile. Whether the audit focus is on deposits, lending or operations, Lindsey has the experience and skill set to develop an all-encompassing plan to manage controls, mitigate risks and remain compliant. Additionally, she has an extensive Bank Secrecy Act (BSA) background and experience conducting and supervising over 50 BSA audits annually.

As a Senior Manager, she oversees fieldwork, communicates with the institution's management team, facilitates exit meetings, reports on engagement findings, and offers corrective and proactive recommendations. Supporting her efforts is a team of compliance and internal audit staff that provide effective services to more than 50 community bank and credit union clients under her supervision.

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Friday, June 23

PAUL H. BREWBAKER, PH.D., CBE
TZ ECONOMICS

Paul H. Brewbaker is the principal of TZ Economics, a Hawaii economics consultancy in corporate work, financial risk and development impact analysis, and litigation support. His background is in research on the Hawaii economy and financial risk analytics from a 25-year affiliation with Bank of Hawaii. He is a graduate of Stanford University and received his Ph.D. from the University of Hawaii, both in economics. He also did graduate work at the University of Wisconsin, taught at its Madison and Milwaukee campuses, and in the University of Hawaii system. He is a member of the American Economic Association, American Finance Association, and National Association for Business Economics with its Certified Business Economist designation. He is a former president of the Hawaii Economic Association.

MEGAN RANGEN, CPA, SENIOR MANAGER
CROWE LLP

Megan Rangen, Sr. Manager at Crowe LLP, has over 10 years of experience providing accounting and assurance services to clients in the financial services industry. During her career, Megan has focused her efforts on serving financial institutions with external audits, including Credit Unions, public company banks, private company banks, trust companies and asset managers. Megan has worked with Credit Unions ranging in size from $300 million to $23 billion and has a focus on the Credit Union industry.

KIAN MOSHIRZADEH, CPA, PARTNER
TWHC

Kian Moshirzadeh is a CPA with more than 30 years of experience working for banks, regulators and credit unions. Over the past 28 years, he has assisted credit unions almost exclusively not just with audits, but with various other issues such as operational effectiveness and efficiencies. He has been instrumental with assisting credit unions in negotiating with regulators and bond carriers.

Over the years, Kian has spoken at many credit union conferences and has provided training to boards and supervisory committees on topics ranging from financial literacy and volunteer governance, to more specific technical topics like balance sheet management, information technology and regulatory updates. Like others at TWHC, Kian provides practical solutions. He has assisted many troubled credit unions and has helped dysfunctional boards to correct problems.

STEPHEN KWOCK, CPA
KWOCK & CO., CPAs

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Saturday, June 24

ANNABEL CHOTZEN
AUTHOR, SPEAKER, BUSINESS & PERSONAL COACH

Annabel Chotzen motivates us with her passion and rejuvenates us with her humor. She empowers us to achieve our goals and then surpass them.

Like her Hawaiian homeland, Annabel's strong yet gentle sprit is irresistible. Her enthusiasm is contagious. Her smile is radiant. She inspires people to believe in themselves.

For more than 20 years Annabel has motivated thousands of people throughout America to meet their challenges, to rise above their limitations, and to create transformation in their lives.