

A Leadership Retreat For Credit Union Executives

NAVIGATING CHANGE WITH CONFIDENCE



2025

June 19th - 20th



Marriott Sand Key | Clearwater Beach, FL

”WHEN THE WORLD SHIFTS, GREAT LEADERS DON'T FREEZE THEY ADAPT.”

OUR SPEAKERS



Tara Murphy

Founder, Tara Murphy Leadership
Emotional Intelligence Specialist
Former COO & CIO



René Clayton

Byte Strategy
AI Strategist & Workforce Futurist

This immersive two-day retreat is your blueprint for thriving through change with clarity, emotional intelligence, and courage.

Escape to Clearwater Beach for an immersive leadership experience designed to help you:

- +** **Adapt** to new realities with resilience and presence
- +** **Align** your leadership with evolving priorities and people
- +** **Advance** your team and membership mission with clarity and heart

This isn't just a retreat. It's the mindset shift that empowers you to thrive in the face of uncertainty.

Throughout the retreat, Tara will guide you through the Adapt. Align. Advance. framework she's developed through decades of leading complex change in credit unions.

Who Should Attend:

This retreat is designed for VPs, directors, and newly promoted executives in the credit union space.

If you're being called to lead change whether in operations, technology, talent, or service this is for you.

What's Included:

- Pre-retreat EQ-i 2.0 Emotional Intelligence Assessment
- Private 1:1 debrief session scheduled post-retreat
- Two days of interactive leadership development tailored to credit unions
- Signature session: Leading Through Change with Emotional Intelligence
- Special Guest Session: René Clayton, Byte Strategy – AI-Driven, Human-Centered Innovation: Adapting with Intention, Aligning with Purpose, Advancing with Confidence
- Custom leadership workbook + practical tools
- Welcome reception with two drink tickets and heavy hors d'oeuvres. The first day ends with a special welcome reception designed to foster meaningful connections. Lunch, and healthy snacks each day
- Post-retreat virtual group follow-up. Access to leadership resources + Tara's office to leadership resources + Tara's office hours

Retreat Investment

\$1,500 per person

THIS RETREAT IS DESIGNED FOR

VPs, directors, and newly promoted executives in the credit union space.

REGISTRATION



CREDIT UNION
LEADERSHIP LAB



Tara@TaraMurphyLeadership.com



+(813) 719-5072



taramurphyleadership.com/registration

Retreat Agenda Overview

Day 01 Adapt & Align

Focus: Self-awareness, resilience, mindset, and strategic alignment

Welcome Session:

The Truth About CHANGE

Session 1:

ADAPT — Leading with emotional agility

Session 2:

ALIGN — Values, people, priorities

Scenario-based leadership breakouts

Evening Welcome Reception

Networking Reception with Signature Cocktails & Savory Bites

Day 02 Advance

Focus: Action, decision-making, and leading the future

Session 3:

ADVANCE — From mindset to strategy

Guest Expert Session:

René Clayton, Byte Strategy
AI + EI: The Future of Member Service and Workforce Leadership

LUNCH + TABLE TALKS

Leadership Blueprint:

Your Adapt. Align. Advance. roadmap

Closing reflection, commitment circle, and group photo

Post-retreat

EQ-i 2.0 debrief sessions scheduled individually

YOUR HOST

Tara brings over 25 years in the credit union industry, leading high-impact transformations from M&As and tech conversions to pandemic pivots, hurricanes, and corporate expansions. She knows how to guide leaders through real change because she's lived it.



Tara Murphy

Founder, Tara Murphy Leadership
Emotional Intelligence Specialist
Former COO & CIO

SPECIAL GUEST

René brings grounded, future-focused insight on how AI and emotional intelligence intersect and how credit union leaders can adapt, align, and advance with purpose and confidence.



René Clayton

Byte Strategy
AI Strategist & Workforce Futurist

REGISTRATION



SPACE IS LIMITED.
RECHARGE. REFOCUS. THRIVE AS YOU LEAD THE FUTURE.



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