

# A Leadership Retreat For Credit Union Leaders

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.

### Retreat Investment

**\$1,500** per person

THIS RETREAT IS DESIGNED FOR  
VPs, directors, and newly promoted  
executives in the credit union space.

### What's Included:

- Pre-retreat EQ-i 2.0 Emotional Intelligence Assessment
- Private 1:1 debrief session scheduled post-retreat
- Signature session: Leading Through Change with Emotional Intelligence
- Special Guest Session: René Clayton, Byte Strategy – AI-Driven, Human-Centered Innovation
- Custom leadership workbook + practical tools
- The first day ends with a special welcome reception designed to foster meaningful connections  
Breakfast, lunch, and healthy snacks each day
- Post-retreat virtual group follow-up  
Access to leadership resources

### 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.*

RECHARGE | REFOCUS | THRIVE AS YOU LEAD THE FUTURE.



SECURE YOUR SPOT NOW  
SPACES ARE LIMITED!



Tara@TaraMurphyLeadership.com



taramurphyleadership.com/registration



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# 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

**BREAKFAST + 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



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