

2014 ANNUAL CONFERENCE

FINANCIAL INCLUSION IN FOCUS: FROM VISION TO REALITY

EVENT SCHEDULE

WEDNESDAY, MAY 14TH, 2014
9:00 AM-12:00 PM

PRE-CONFERENCE SESSIONS

- Affordable Homeownership Roundtable
- CDFI Clinic: CUB Consultations
- Communicating Arts Credit Union Site Visit and Tour (9:30-11:30 AM)

12:00 PM

LUNCH

Welcome: Michael Edward Duggan, Mayor of Detroit

12:30- 2:00 PM

OPENING PLENARY

LMI Trends and the Opportunities They Present for Credit Unions Through 2020

- Patick Adams, CEO, St. Louis Community Credit Union
- Rita Haynes, CEO Emeritis, Faith Community United Federal Credit Union
- Jonathan Morduch, Professor of Public Policy and Economics, New York University- Invited

2:00 PM- 3:30 PM

EARLY AFTERNOON WORKSHOPS

Track 1- Insights: Keeping Up with Evolving Member Expectations

- Richard Campbell, CFO, Hope Credit Union
- Steve Zuckerman, Executive VP, Self-Help

Track 2- Innovation: Scalable Products for LMI Members

- Mark Lynch, Credit Union Consultant, National Credit Union Foundation
- Dave Prosser, VP, Freedom First Credit Union
- Neighborhood Trust Federal Credit Union- Invited

Track 3- Compliance & Capacity Building: Developing a Non-Profit Affiliate

- Sheila Schat, Partner Consultant, CUB
- Neil Stevenson, Senior Staff Attorney, Lawyer's Alliance

Special Session- Cooperative Finance Leaders of America

- Monique Dunbar, Cooperative Finance Leader of America Fellow at Credit Union of Atlanta
- Lauren Hudson, Cooperative Finance Leader of America Fellow at Bethex
- Lila Phimmasone, Cooperative Finance Leader of America Fellow at Genesee
- Ash Exantus, CEO, Urban Upbound Federal Credit Union

4:00 PM-5:30 PM

LATE AFTERNOON WORKSHOPS

Track 1- Insights: The Impact of Financial Counseling Through Credit Unions

- Karen Casler, Financial Counseling Manager, Case Credit Union
- Amber Paxton, Director, Financial Empowerment Center
- Neighborhood Trust Financial Partners- Invited

Track 2- Innovation: Next Wave Financial Management Tools

- Francisco Cervera, Co-Founder & CEO, EMoneyPool
- Sherod Halliburton, CEO, Manatee Community Federal Credit Union
- Jonathan Harrison, CEO, Emerge
- Ian Lampl, Co-Founder & CEO, Loan Street

Track 3- Compliance & Capacity Building: Reflections from Funders on Funding Directions

- Amy Brown, Program Officer, Ford Foundation
- Benita Melton, Program Officer, Mott Foundation - Invited
- Bill Myers, Officer Director, National Credit Union Association

Special Session- National Cooperative Bank Workshop: Financing Co-ops

- Casey Fannon, Senior VP, National Cooperative Bank- Invited

5:30 PM- 6:00 PM

EXHIBITOR BREAK

6:00 PM- 7:30 PM

RECEPTION

THURSDAY, MAY 15TH, 2014
8:30 AM

BREAKFAST

9:00 AM-9:45 AM

MORNING PLENARY

Empowering Americans to Build Their Financial Security

- Bob Annibale, Global Director of Micro Finance and Community Development, CitiGroup
- Michael Barr, Professor of Law, University of MI

10:00 AM- 11:30 AM

MORNING WORKSHOPS

Track 1- Insight: The Role of Predictive Analytics

- Scott Graffius, Direct Marketing Analytics Manager, Credit Union National Association Mutual Group
- Jay Nadboralski, Senior Manager, Credit Union National Association Mutual Group

Track 2- Innovation: Integrating Financial Services into Social Service Delivery

- Gregg Brown, President/CEO, Southside Community Federal Credit Union
- Margaret Libby, Executive Director, Mission SF Community Financial Center
- Ayom Siengo, Manager of Economic Development, The Community Builders
- Paul Woodruff, Director, St. Louis Community Credit Union

Track 3- Compliance & Capacity Building: Regulatory Updates and Current Issues from National Credit Union Association

- Jamie Howell, Compliance Consultant, Credit Union Solutions Group
- Larry Schoeberl, Supervision Analyst, National Credit Union Administration
- Jason Schultz, Consumer Access Analyst, National Credit Union Administration
- David Sieminski, Policy Analyst, CFMB Consumer Financial Protection Representative

Special Session- CDCU Risk Institute: Risk Management for small and Faith-Based Credit Unions

- W. Kent Hartzler, Everence Federal Credit Union
- Mark A. Regier, Everence Federal Credit Union

12:00 PM

LUNCH

Special Presentation: Mary Dunn, Senior VP and Deputy General Counsel, CUNA

12:30 PM- 1:30 PM

LUNCH PLENARY

Serving Immigrant Communities

- Deyanira Del Rio, Co-Director, New Economy Project
- Annette LoVoi, Financial Access & Asset Building Program Director, Appleseed
- Luis Pastor, CEO, Latino Community Credit Union

1:30 PM- 2:00 PM

EXHIBITOR BREAK

2:00 PM- 3:30 PM

AFTERNOON WORKSHOPS

Track 1- Insights- The Power of State CDFI Coalitions

- Tristram Coffin, CEO, Alternatives Federal Credit Union
- Seth Julyan, VP Membership, Opportunity Finance Network

Track 2- Innovation: Core Banking and the Needs of the LMI Market

- Jason Berard, President/CEO, Carter Federal Credit Union
- Kevin Burke, Director of IT, ASI Federal Credit Union
- Teri Robinson, CEO, Pacific NorthWest Federal Credit Union

Track 3- Compliance & Capacity Building: Red Flag Warnings - What Every CEO Should Know Part 1

- Speaker information will be available soon

Special Session - CDFI Certification - Building Blocks of Sustainable Growth

- Pablo DeFilippi, Director of Membership, Federation
- Terry Ratigan, Senior Development Consultant, Federation

4:00 PM- 5:00 PM

REGIONAL CAUCUS

6:00 PM- 7:30 PM

RECEPTION

FRIDAY, MAY 16TH, 2014
8:00 AM

BREAKFAST

Special Presentation: Dennis Nolan, Senior Advisor, CDFI Fund

9:00 AM-10:30 AM

MORNING PLENARY

The Financial Lives of Low-Income Consumers

- Alex Horowitz, Research Manager, The Pew Charitable Trusts
- Kirsten Moy, Director of Scale Initiatives, Aspen Institute
- Lisa Servon, Professor/Formal Dean, The New School for Public Engagement

10:45 AM- 12:00 PM

MORNING WORKSHOPS

Track 1- Insights: Behavior-Driven Asset Building Strategies

- Jessica DeMorest, Project Manager, Credit Union Solutions
- Shira Markoff, Senior Program Manager, CFED

Track 2- Innovation: Meeting the Financial Needs of Immigrants

- Jason Chang, Program Associate, Federation
- Sarah Marshall, Marketing and Partnerships Manager, North Side Community Federal Credit Union
- Winova Nava, CEO, Guadalupe Credit Union
- Marisabel Torres, Policy Analyst, National Council of La Raza

Track 3- Compliance & Capacity Building: Ramping Up Your Lending

- Speaker information will be available soon

Special Session- Strategic Planning: The Foundation of a Successful CDFI Application

- Pablo DeFilippi, Director of Membership, Federation
- Terry Ratigan, Senior Development Consultant, Federation
- Scott Butterfield, Strategic Planning Consultant, Your Credit Union Partner

12:00 PM- 1:00 PM

BUSINESS MEETING

1:00 PM- 2:30 PM

ANNIE VAMPER AWARDS LUNCHEON

Awardee: Rita Haynes, CEO Emeritis, Faith Community United Federal Union

3:00 PM

CONFERENCE ADJOURNED