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
- Patrick 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

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/Former 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**