



May 30, 2024

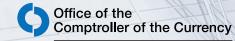
FINANCIAL INCLUSION SUMMIT

Roundtable for Economic Access and Change

GROUP A Auditorium

8:40–8:45 a.m.	Welcome Lot Diaz, Vice President, Housing and Financial Empowerment, UnidosUS
8:45–9:15 a.m.	Overview of Projects Nearing Completion
	Moderator: Barry Wides, Deputy Comptroller for Community Affairs, OCC
	Panelists: D.J. Valentine, Vice President and Community Lending Manager, Huntington Bank Nikki Bialka, Vice President and National Community Lending Strategy Manager, Fifth Third Bank
9:20–9:50 a.m.	Overview of Market Conditions Impacting Financial Inclusion
	Facilitator: Barry Wides, Deputy Comptroller for Community Affairs, OCC
	Sam Khater, Vice President, Chief Economist and Head of Economic & Housing Research Department, Freddie Mac
10:00–11:15 a.m.	Developing Tools, Products, and Services for Financial Inclusion
	Moderators: Dr. Ammar Askari, Director for Community Affairs Outreach, OCC Dr. Jud Murchie, Executive Director, Diverse Segments Customer Strategy and Research, Wells Fargo
	Panelists: Dr. Chris Herbert, Managing Director, Harvard Joint Center for
	Housing Studies
	Dr. Vanessa Perry, Interim Dean, George Washington University School of Business & Nonresident Fellow, Urban Institute Housing Finance Policy Center
	Dr. Jason Jackson, Associate Professor in Political Economy and Urban Planning & Director, Political Economy Lab, Massachusetts Institute of Technology
	Chenab Navalkha, Doctoral Candidate in Urban Studies and Planning, Massachusetts Institute of Technology

11:15–11:55 a.m.	Creating Opportunities for Underserved and Disadvantaged Populations
	Moderators: Barry Wides, Deputy Comptroller for Community Affairs, OCC Erin Quinn, Senior Vice President & Head of Home Lending Public Policy,
	Wells Fargo Panelists: Ken Fears, Senior Policy Representative for Banks, Lending, and Housing
	Finance, National Association of REALTORS® Leigh Lester, Founder and Executive Director, Ubuntu Institute of Learning Michael Neal, Senior Fellow, Housing Finance Policy Center, Urban Institute
11:55 a.m.	Concluding Remarks Lot Diaz, Vice President, Housing and Financial Empowerment, UnidosUS
12:00 p.m.	Adjournment





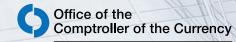
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GROUP B Room 1W-410/420

	9:00–9:05 a.m.	Welcome Lissette Flores, Community Relations & Minority Affairs Specialist, OCC
	9:10–10:00 a.m.	Developing Tools, Products, and Services for Small and Minority Businesses
		Moderators: Lissette Flores, Community Relations & Minority Affairs Specialist, OCC Randi Zeller, Vice President, Strategic Partnerships and Development, Community Reinvestment Fund, USA
		Panelists: Jason Hoover, Vice President, Diverse Segments Program Manager, U.S. Bank Sahra Halpern, President and CEO, Business Consortium Fund Tafara Jhamba, Chief Operating Officer, Founders' Impact Inc. Patrick Davis, Senior Vice President, Platform and Technology Services, Community Reinvestment Fund, USA
	10:10–11:00 a.m.	Utilizing Technology to Expand Credit for Disadvantaged Small and Minority Businesses
		Moderators: Terence Culler, Director for Retail Credit Risk, OCC Steve Ely, CEO, eCredable
		Panelists: Kelly Cochran, Chief Program Officer, FinRegLab Rohit Arora, CEO and Co-Founder, Biz2Credit Everett Sands, CEO, Lendistry Ryan Leggett, CEO, Gig Worker Solutions
	11:10 a.m12:00 p.m.	Group-Based and Place-Based Initiatives Supporting Entrepreneurs
		Moderators: Lissette Flores, Community Relations & Minority Affairs Specialist, OCC Laurie Vignaud, President and CEO, LiftFund
		Panelists:
		Hilda Kennedy, President and CEO, AmPac Abigail Golden-Vasquez, Vice President, Programs, Prosperity Now Jevaughn Sterling, Executive Vice President, Diverse Markets Manager, Amegy Bank
	12:00 p.m.	Adjournment





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GROUP C Conference Room A/B/C

9:00–9:05 a.m.	Welcome Louisa Quittman, Community Development Expert, OCC
9:10-10:00 a.m.	Community Needs and Consumer Perspectives on Access to Affordable Credit
	Moderator: Louisa Quittman, Community Development Expert, OCC
	Panelists: Susana Barragán, Policy Analyst, UnidosUS Alex Horowitz, Project Director, Housing Policy Initiative, The Pew Charitable Trusts Brett Theodos, Senior Fellow and Director of the Community Economic Development Hub, Urban Institute
10:10-11:00 a.m.	Utilizing Technology to Increase Access to Credit
	Moderator: Crystal Dully, Community Relations and Minority Affairs Specialist, OCC
	Panelists: Phil Goldfeder, CEO, American Fintech Council James Garvey, Founder, Self Financial Nat Hoopes, Head of Public Policy, Upstart Mat Despard, Vice President, Research and Policy, SaverLife
11:10 a.m12:00 p.m.	Expanding Availability of Small Dollar Credit – Next Frontiers
	Moderator: Louisa Quittman, Community Development Expert, OCC
	Panelists: Dara Duguay, CEO, Credit Builders Alliance Hala Farid, Executive Director, Texas Community Capital/Community Loan Center of America Christopher Leonard, CEO, Velocity Solutions
12:00 p.m.	Adjournment
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