



**PROJECT
REACH**

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.m.–12:00 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.m.–12:00 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