

National Bank On Leadership Training Agenda

Tuesday, October 9

11:30 AM REGISTRATION AND LUNCH

12:00 PM WELCOME

Angie Lathrop, *Community Affairs Executive*, and Jason Martin, *Checking and Debit Product Management Executive*, Bank of America

12:15 PM INTRODUCTION TO BANK ON COALITION LEADERSHIP

Jonathan Mintz, *President and CEO*, Cities for Financial Empowerment Fund (CFE Fund)

12:45 PM INPUTS

Amelia Erwit, *Managing Director*, CFE Fund (moderator)
Paige Diner, *Associate*, CFE Fund
Scarlett Montenegro, *Program Officer*, United Way of Miami-Dade/Bank On Miami
Erin Waddell, *Social Service Policy & Advocacy Manager*, Louisville Metro Government/Bank On Louisville

2:00 PM BREAK

2:15 PM PRODUCTS: Improving the Financial Services Marketplace for Basic Transaction Accounts

David Rothstein, *Principal*, CFE Fund (moderator)
Jerome Brown, *Senior Vice President*, The First, A National Banking Association
Amelia Erwit, *Managing Director*, CFE Fund
Yvonne Green, *Director*, Bank On Houston
Melanie Stern, *Community Reinvestment Act Officer*, Spring Bank

3:45 PM BREAK

4:00 PM PEOPLE: Connecting Un- and Underbanked People to Certified Accounts

I-Hsing Sun, *Chief Program Officer*, CFE Fund (moderator)
José Cisneros, *Treasurer*, City and County of San Francisco/Bank On San Francisco
Michelle Hammonds, *DC Department of Insurance, Securities and Banking*/Bank On DC
Velma Kyser, *Financial Empowerment Center Program Manager*, Lansing Office of Financial Empowerment

5:30 PM BREAKOUT DISCUSSIONS

6:15 PM RECEPTION

Welcome remarks by Ximena Delgado, *Senior Vice President*, Bank of America Charitable Foundation

Wednesday, October 10

8:30 AM BREAKFAST

9:00 AM WELCOME

Angie Lathrop, *Bank of America*
Jonathan Mintz, *CFE Fund*

9:15 AM PARTNERS: Investing in and Nurturing Vibrant Banking Access Coalitions

Jeanne Marra, *Principal*, Marrcomm Partners (moderator)
Alice Coday, *Director*, Financial Empowerment Network Seattle-King County/Bank On Seattle
Stephanie Matthews, *Director*, Bank On Arkansas+
Katherine Pitman, *Fellow*, United Way of Southwest Alabama/Bank On South Alabama
Lisa Price, *Vice President*, Asset Building Program Manager, Wells Fargo

10:45 AM BREAK

11:00 AM PROGRESS: Promoting Banking Access Issues

Katie Plat, *Principal*, CFE Fund (moderator)
Keith Ernst, *Associate Director*, Consumer Research & Examination Analytics, Federal Deposit Insurance Corporation
Annie Harper, *Instructor*, Yale University Department of Psychiatry
Andrea Luquetta-Kern, *Deputy Director*, California Reinvestment Coalition
Anne Romatowski, *Vice President*, JPMorgan Chase

12:30 PM CLOSING REMARKS