



Annual Conference Agenda
Equity in Action
October 10-11, 2024
The Royal Sonesta Washington, DC - Capitol Hill
Subject to Change

Thursday, October 10th <i>NBA Board of Directors, Members & Advisory Council Members Only</i>	
8:30am – 9:45am	NBA Board of Directors Meeting
10:00am – 10:45am	NBA Strategic Advisory Council Meeting
11:00am – 11:45am	NBA Member Meeting & Elections
11:45am – 12:00pm	Break
Thursday, October 10th <i>Open to All Conference Attendees</i>	
9:00am – 5:00pm	Registration
11:00am – 5:00pm	U.S. Department of Treasury ECIP Office Hours <i>Sign up in advance or on site</i>
11:00am – 12:00pm	Networking Lunch
12:00pm – 12:15pm	Welcome & Chairman’s Remarks Remarks <ul style="list-style-type: none"> • Robert E. James II, Outgoing Chair, National Bankers Association and President & CEO, Carver Financial Corporation • Todd McDonald, Incoming Chair, National Bankers Association and President, Liberty Bank & Trust
12:15pm – 1:30pm	Equity Under Attack: How to Approach DEI Resistance Fireside Chat with Congressman Steven Horsford, Chair, Congressional Black Caucus <ul style="list-style-type: none"> • Moderator: Robert E. James II, President & CEO, Carver Financial Corporation

	<p>Presentation on Corporate Commitments: Tawanda Sibanda, Partner, McKinsey & Company</p> <p>Presentation on Legal Trends: Zakiyyah Salim-Williams, Partner & Chief Diversity Officer, Gibson Dunn</p> <p>Panel:</p> <ul style="list-style-type: none"> • Rebecca Greenfield, Senior Editor at Large, Bloomberg (Moderator) • Michael Hyter, President & CEO, The Executive Leadership Council • Jarvis Stewart, Chairman & CEO, Highland Poe LLC • Zakiyyah Salim-Williams, Partner & Chief Diversity Officer, Gibson Dunn • Marla Bilonick, President & CEO, National Association for Latino Community Asset Builders
1:30pm – 1:45pm	Exhibitor Break
1:45pm – 2:15pm	<p>2024 Elections: Preparing for Economic and Corporate Change <i>Sponsored by IntraFi</i></p> <p>Panel:</p> <ul style="list-style-type: none"> • Kevin Boyce, Founder & Vice Chairman, Adelphi Bank (Moderator) • Terrence Woodbury, Chief Executive Officer & Founding Partner, HIT Strategies • Ja’Ron Smith, Partner, CGCN Group • Greg Schultz, Former Senior Advisor to Presidents Biden and Obama
2:15pm – 2:30pm	<p>2024 Elections: What It Means for Banking <i>Sponsored by IntraFi</i></p> <p>Fireside Chat with Rob Blackwell, Chief Content Officer & Head of External Affairs, IntraFi</p> <p>Moderator: Kevin Boyce, Founder & Vice Chairman, Adelphi Bank</p>
2:30pm – 2:45pm	<p>Exhibitor Break <i>Sponsored by Federal Home Loan Bank</i></p>
2:45pm – 3:15pm	<p>Harnessing the Power of Storytelling: Transforming Marketing for MDIs <i>Sponsored by Fiserv</i></p> <p>Panel:</p> <ul style="list-style-type: none"> • Molly Moran, Communications and Marketing Director, National Bankers Association (Moderator)

	<ul style="list-style-type: none"> • Rachele Gregory, Chief Impact Officer & VP of Marketing, Carver State Bank • Lacreacia Cade, Head of Brand Operations, Fiserv • Drew Payne, CEO, UpMetrics • Dr. Maurice Hobson, Historian, Author & Social Scientist
3:15pm – 3:30pm	Exhibitor Break
3:30pm – 3:45pm	<p>One Question with Wall Street Bank CEOs: Solutions and Strategies for MDIs Success</p> <p>Recorded Remarks:</p> <ul style="list-style-type: none"> • Jane Fraser, CEO, Citigroup • Charles W. Scharf, CEO & President, Wells Fargo & Company • Andrew Cecere, Chairman & CEO, U.S. Bancorp • William H. Rogers Jr., Chairman & CEO, Truist Financial Corporation • Matt Sable, Head of Financial Institutions Group, JPMorganChase
3:45pm – 5:00pm	<p>Ask the Experts Breakout Groups <i>Sponsored by Citi Foundation and Paul, Weiss, Rifkind, Wharton & Garrison LLP</i></p> <p style="text-align: center;">3:50pm – 4:20pm: Attend First Breakout Group of Choice 4:30pm – 5:00pm: Attend Second Breakout Group of Choice</p> <ol style="list-style-type: none"> 1. Climate Products & PACE Financing: Why You Should Care <ul style="list-style-type: none"> • Bill Peterson, Director of Climate Lending, Amalgamated Bank • Reggie Webber, Chief Credit Officer, Optus Bank • Amir Kirkwood, CEO, Justice Climate Fund 2. The Current State of M&A Activity: What to Be Prepared For <ul style="list-style-type: none"> • Jarryd Anderson, Partner, Paul Weiss • Wendell McCain, MDI Keeper’s Fund • MDI Bank Representative 3. Cyber Security, Risk Management & Digitization: Keeping Your Data and Customers Safe <ul style="list-style-type: none"> • Charles Maxell, Managing Director, Marsh • Wells Fargo Representative • FICO Representative
5:00pm – 7:00pm	<p>Welcome Reception: Celebrating Legacy</p> <p>Remarks:</p> <ul style="list-style-type: none"> • Cedric Richmond, Former Congressman & DNC Senior Advisor • Senator Mark Warner, Senate Committee on Banking, Housing & Urban Affairs and Senate Community Development Finance Caucus Co-Chair

	<ul style="list-style-type: none"> • Congressman Glenn Ivey • Alden McDonald, CEO, Liberty Bank & Trust • Robert E. James, President & CEO, Carver State Bank <p>Special Recognition:</p> <ul style="list-style-type: none"> • National Bankers Association & Foundation Board of Directors • National Bankers Association Strategic Advisory Council Members • National Bankers Association New Member Banks
7:00pm – 9:00pm	NBA Member CEO Dinner (Invitation Only) <i>Sponsored by Wells Fargo</i>
Friday, October 11th <i>Open to All Conference Attendees</i>	
9:00am – 12:00pm	Registration
9:00am – 9:30am	<p>Breakfast with the Regulator: A Conversation with The Honorable Michael Hsu, Acting Comptroller, Office of the Comptroller of the Currency <i>Sponsored by Wells Fargo</i></p> <p>Moderator: Nicole Elam, President & CEO, National Bankers Association</p> <p>Remarks:</p> <ul style="list-style-type: none"> • Grovetta Gardineer, Senior Deputy Comptroller, Office of the Comptroller of the Currency • Erica Miles, Executive Director, Wells Fargo
9:30am – 10:00am	<p>Breakfast with the Regulator: A Conversation with The Honorable Martin Gruenberg, Chairman, Federal Deposit Insurance Corporation <i>Sponsored by Wells Fargo</i></p> <p>Moderator: Kevin Cohee, Chairman & CEO, OneUnited Bank</p>
10:00am – 10:15am	<p>Exhibitor Break <i>Sponsored by Robinhood</i></p>
10:15am – 10:45am	<p>An Equitable Climate Transition: A Conversation with David Widawsky, Greenhouse Gas Reduction Fund Director, Environmental Protection Agency <i>Sponsored by Moody's CORE</i></p> <p>Moderator: Cynthia Newell, Senior Vice President, City First Bank</p> <p>Remarks: Greg Robinson, Managing Director, Moody's Ratings</p>
10:30am – 10:45am	Exhibitor Break

10:45am – 11:15am	<p>The Future of Financial Services: A Conversation with Jennifer Kuperman, Chief Corporate Affairs Officer, Chime <i>Sponsored by Chime</i></p> <p>Moderator: Carlos Naudon, President & CEO, Ponce Bank</p>
11:15am – 11:30am	<p>Exhibitor Break <i>Sponsored by TD Bank</i></p>
11:30am – 12:00pm	<p>The Future of Payments: A Conversation with Denise Leonhard, General Manager, Zelle <i>Sponsored by Zelle</i></p> <p>Moderator: Denise Luu, Vice President, East West Bank</p>
12:00pm – 12:15pm	<p>Exhibitor Break</p>
12:15pm – 1:45pm	<p>The Future of Innovation Luncheon <i>Sponsored by U.S. Bank</i></p> <p>Panel: Banking-as-a-Service: Lessons Learned, What Went Wrong</p> <ul style="list-style-type: none"> • Miriam Cross, Reporter, American Banker (Moderator) • Dan Dall'Asta, SVP, Newline at Fifth Third Bank • Brian Graham, Partner, Kloros Group • Erin Cohee, Vice President, OneUnited Bank <p>Disruptor Exchange: An Audience Conversation on the Future of Innovation for Minority Banks with Don Relyea, Chief Innovation Officer, U.S. Bank; Dakota Crow, Sr. Innovation Specialists, U.S. Bank; Mimi Richburg, Inclusive Growth Consultant, U.S. Bank</p> <p>Live Podcast: AI – What’s Fact? What’s Fiction?</p> <ul style="list-style-type: none"> • Jo Ann Barefoot, CEO & Cofounder, Alliance for Innovative Regulation (Moderator) • David Castillo, Managing Director, JPMorganChase • Cat Tucker, Chief of Staff to CEO, Moody's • Michael Akinwumi, Chief AI Officer, National Fair Housing Alliance
1:45pm – 2:00pm	<p>Exhibitor Break <i>Sponsored by FIS</i></p>
2:00pm – 2:15pm	<p>The State of MDIs: The Research <i>Sponsored by JPMorganChase</i></p> <p>Presentation: Anthony Barr, Research & Impact Director, National Bankers Association Foundation</p>

2:15pm – 2:45pm	<p>The State of MDIs: The Discourse <i>Sponsored by Kresge Foundation</i></p> <p>Panel:</p> <ul style="list-style-type: none"> • Anthony Barr, Research & Impact Director, National Bankers Association Foundation (Moderator) • Alicia Wilson, Managing Director and Head of Regional Philanthropy for North America, JPMorganChase • Erika Brice, Social Investment Officer, The Kresge Foundation • Jake Levy, Analyst, VISA Economic Empowerment Institute • John Holdsclaw IV, President and CEO, Rochdale Capital • Rey Garcia, Executive Vice President, Texas National Bank
2:45pm – 3:00pm	Exhibitor Break
3:00pm – 3:30pm	<p>The U.S. Economy with Jared Bernstein, Chair, Council of Economic Advisors, The White House <i>Sponsored by FICO</i></p> <p>Remarks: Gigi Ligons, Director of Client Services, FICO</p>
3:30pm – 4:00pm	<p>Impact Investing Redefined: The Launch of MDI Equity Bonds</p> <p>Panel:</p> <ul style="list-style-type: none"> • Chris White, Deputy Executive Director, National Bankers Association Foundation (Moderator) • Marcus Martin, Head of ESG Advisory & Digital Assets, U.S. Bank • Zoila Jennings, Lead Impact Investment Officer, Robert Wood Johnson Foundation • Rey Ramsey, President & CEO, Nathan Cummings Foundation
4:00pm – 5:00pm	<p>Closing Reception & Awards Presentation</p> <p>Corporate Excellence Award</p> <p>Kim D. Saunders Women in Banking Award</p> <p>B. Doyle Mitchell, Sr. Trailblazer Award</p>
TIME TBD	<p>Visa’s Commitment to and Process for Placing Deposits at MDIs</p> <p>Recorded Remarks: Worku Gachou, Head of North America Inclusive Impact & Sustainability, Visa</p>