



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

<b>Thursday, October 10<sup>th</sup></b> <b><i>NBA Board of Directors, Member Banks &amp; Advisory Council Members Only</i></b>	
8:30am – 9:45am <i>Jewel B</i>	NBA Board of Directors Meeting
10:00am – 10:45am <i>Jewel B</i>	NBA Strategic Advisory Council Meeting
11:00am – 11:45am <i>Jewel A</i>	NBA Member Meeting & Elections
11:45am – 12:00pm	Break
<b>Thursday, October 10<sup>th</sup></b> <b><i>Open to All Conference Attendees</i></b>	
9:00am – 5:00pm <i>Jewel Foyer</i>	Registration
11:00am – 5:00pm <i>Elizabeth Catlett</i> <i>2<sup>nd</sup> Floor</i>	U.S. Department of Treasury ECIP Office Hours <i>Sign up in advance or on site</i>
11:00am – 12:00pm <i>Crown Ballroom</i>	Networking Lunch <i>Pickup Lunch in Sapphire</i>
12:00pm – 12:15pm <i>Crown Ballroom</i>	Welcome & Chairman's Remarks  Remarks <ul style="list-style-type: none"> <li>• Robert E. James II, Outgoing Chair, National Bankers Association and President &amp; CEO, Carver Financial Corporation</li> <li>• Todd McDonald, President, Liberty Bank &amp; Trust</li> </ul>
12:15pm – 1:30pm <i>Crown Ballroom</i>	Equity Under Attack: How to Approach DEI Resistance  This luncheon will address challenges facing MDIs amid rising scrutiny of DEI initiatives and highlight the new Congressional Black Caucus

	<p>Corporate Accountability Report and Congressional Hispanic Caucus congressional inquiry on corporate diversity. Experts will discuss recent legal developments and corporate trends threatening equitable access to financial services and share strategies for advocacy and engagement.</p> <p>Recorded Remarks: Congressman Steven Horsford, Chair, Congressional Black Caucus</p> <p>Fireside Chat with and Congresswoman Nanette Barragán, Chair, Congressional Hispanic Caucus and Todd McDonald, President, Liberty Bank &amp; Trust</p> <p>Presentation on “What’s at Stake: The Evolving Corporate DEI Commitment Landscape” by Tawanda Sibanda, Partner, McKinsey &amp; Company</p> <p>Presentation on “Trends in Anti-DEI Lawsuits &amp; Legislation” by Zakiyyah Salim-Williams, Partner &amp; Chief Diversity Officer, Gibson Dunn</p> <p>Panel:</p> <ul style="list-style-type: none"> <li>• Robert E. James II, President &amp; CEO, Carver Financial Corporation (Moderator)</li> <li>• Michael Hyter, President &amp; CEO, The Executive Leadership Council</li> <li>• Jarvis Stewart, Chairman &amp; CEO, Highland Poe LLC</li> <li>• Zakiyyah Salim-Williams, Partner &amp; Chief Diversity Officer, Gibson Dunn</li> <li>• Marla Bilonick, President &amp; CEO, National Association for Latino Community Asset Builders</li> </ul>
1:30pm – 1:45pm	Exhibitor Break
1:45pm – 2:30pm <i>Crown Ballroom</i>	<p>2024 Elections: Preparing for Economic and Corporate Change <i>Sponsored by IntraFi</i></p> <p>As the election approaches, this panel will examine the potential impacts on the economy and corporate landscape. Experts will analyze key trends, policy proposals, and their implications for businesses and financial institutions. Attendees will gain insights into navigating uncertainty and positioning their organizations for success in a changing political environment.</p> <p>Panel:</p> <ul style="list-style-type: none"> <li>• Kevin Boyce, Founder &amp; Vice Chairman, Adelphi Bank (Moderator)</li> <li>• Rob Blackwell, Chief Content Officer &amp; Head of External Affairs, IntraFi</li> <li>• Terrence Woodbury, Chief Executive Officer &amp; Founding Partner, HIT Strategies</li> </ul>



<i>Jewel B</i>	<p>3. The Current State of M&amp;A Activity: What to Be Prepared For Hear from experts and MDIs on the climate around M&amp;A activity for community banks and the impact on your bank if you buy or sale.</p> <ul style="list-style-type: none"> <li>• Jarryd Anderson, Partner, Paul Weiss</li> <li>• Dom Mjartan, Vice Chair, Optus Bank</li> <li>• Carlos Naudon, President &amp; CEO, Ponce Bank</li> </ul>
<p>5:00pm – 7:00pm <i>Sapphire</i></p>	<p>Welcome Reception: Celebrating Legacy</p> <p>Remarks:</p> <ul style="list-style-type: none"> <li>• Cedric Richmond, Former Congressman &amp; DNC Senior Advisor</li> <li>• Senator Mark Warner, Senate Committee on Banking, Housing &amp; Urban Affairs and Senate Community Development Finance Caucus Co-Chair</li> <li>• Congressman Glenn Ivey</li> <li>• Alden McDonald, CEO, Liberty Bank &amp; Trust</li> <li>• Robert E. James, President &amp; CEO, Carver State Bank</li> </ul> <p>Special Recognition:</p> <ul style="list-style-type: none"> <li>• National Bankers Association &amp; Foundation Board of Directors</li> <li>• National Bankers Association Strategic Advisory Council Members</li> <li>• National Bankers Association New Member Banks</li> </ul>
<p>7:00pm – 9:00pm</p>	<p>NBA Member CEO Dinner (Invitation Only) <i>Sponsored by Wells Fargo</i></p> <p><i>Charlie Palmer Steak</i> <i>101 Constitution Avenue, NW</i></p>
<p><b>Friday, October 11<sup>th</sup></b> <b><i>Open to All Conference Attendees</i></b></p>	
<p>8:00am – 12:00pm <i>Jewel Foyer</i></p>	<p>Registration</p>
<p>8:00am – 9:00am <i>Crown Ballroom</i></p>	<p>Networking Breakfast <i>Pickup Breakfast in Sapphire</i></p>
<p>9:00am – 9:30am <i>Crown Ballroom</i></p>	<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 &amp; CEO, National Bankers Association</p> <p>Recorded Remarks: Charles W. Scharf, CEO &amp; President, Wells Fargo &amp; Company</p>

9:30am – 10:00am <i>Crown Ballroom</i>	<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 &amp; CEO, OneUnited Bank</p> <p>Remarks: Erica Miles, Executive Director, Wells Fargo &amp; Company</p>
10:00am – 10:15am	<p>Exhibitor Break <i>Sponsored by Robinhood</i></p>
10:15am – 10:45am <i>Crown Ballroom</i>	<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>Join us for an enlightening fireside chat on climate change, opportunities for community lenders, and the future of the Greenhouse Gas Reduction Fund.</p> <p>Moderator: Cynthia Newell, Senior Vice President, City First Bank</p> <p>Remarks: Greg Robinson, Managing Director, Moody's Ratings</p>
10:45am – 11:00am	<p>Exhibitor Break <i>Sponsored by TD Bank</i></p>
11:00am – 11:25am <i>Crown Ballroom</i>	<p>The Future of Financial Services: A Conversation with Jennifer Kuperman, Chief Corporate Affairs Officer, Chime <i>Sponsored by Chime</i></p> <p>Join us for a compelling fireside chat on the role of fintech in enhancing access to banking, innovation, and the importance of customer-centric solutions for underserved communities.</p> <p>Moderator: Carlos Naudon, President &amp; CEO, Ponce Bank</p>
11:25am – 11:30am <i>Crown Ballroom</i>	<p>Visa's Commitment to and Process for Placing Deposits at MDIs</p> <p>Recorded Remarks: Worku Gachou, Head of North America Inclusive Impact &amp; Sustainability, Visa</p>
11:30am – 11:55am <i>Crown Ballroom</i>	<p>The Future of Payments: A Conversation with Denise Leonhard, General Manager, Zelle <i>Sponsored by Zelle</i></p> <p>Join us for an insightful discussion as we explore the evolving landscape of payments in today's digital economy and delve into the latest trends, challenges in payment technologies, and how they impact MDIs and their</p>

	<p>customers.</p> <p>Moderator: Denise Luu, Vice President, East West Bank</p>
11:55am – 12:20pm <i>Crown Ballroom</i>	<p>Exhibitor Break – Lunch Buffet <i>Pickup Lunch in Sapphire</i></p>
12:20pm – 1:45pm <i>Crown Ballroom</i>	<p>The Future of Innovation Luncheon <i>Sponsored by U.S. Bank</i></p> <p>Recorded Remarks: Andrew Cecere, Chairman &amp; CEO, U.S. Bancorp</p> <p>Panel: Banking-as-a-Service: Lessons Learned, What Went Wrong This panel will analyze the challenges faced in the Banking as a Service model, highlighting key lessons for future implementation.</p> <ul style="list-style-type: none"> <li>• Miriam Cross, Reporter, American Banker (Moderator)</li> <li>• Dan Dall'Asta, Senior Vice President, Newline at Fifth Third Bank</li> <li>• Brian Graham, Partner, Kloros Group</li> </ul> <p>Disruptor Exchange: An Audience Conversation with Don Relyea, Chief Innovation Officer, U.S. Bank; Dakota Crow, Sr. Innovation Specialist, U.S. Bank; and Mimi Richburg, Inclusive Growth Consultant, U.S. Bank A forward-looking dialogue with the audience on emerging trends and strategies for innovation within minority banking, emphasizing opportunities for growth and resilience.</p> <p>Live Podcast: AI – What's Fact? What's Fiction? Experts will delve into the realities and misconceptions surrounding AI in banking, discussing its potential benefits and pitfalls for MDIs.</p> <ul style="list-style-type: none"> <li>• Jo Ann Barefoot, CEO &amp; Cofounder, Alliance for Innovative Regulation (Moderator)</li> <li>• David Castillo, Managing Director, JPMorganChase</li> <li>• Cat Tucker, Chief of Staff to CEO, Moody's</li> <li>• Michael Akinwumi, Chief AI Officer, National Fair Housing Alliance</li> </ul>
1:45pm – 2:00pm	<p>Exhibitor Break <i>Sponsored by FIS</i></p>
2:00pm – 2:15pm <i>Crown Ballroom</i>	<p>The State of MDIs: The Research <i>Sponsored by JPMorganChase</i></p> <p>Recorded Remarks: Matt Sable, Head of Financial Institutions Group, JPMorganChase</p> <p>Presentation: Anthony Barr, Research &amp; Impact Director, National Bankers Association Foundation</p>

	Hear the latest research from the National Bankers Association and National Bankers Association Foundation’s “State of MDI” report with updated analysis of the sector and its lending activities.
2:15pm – 2:45pm <i>Crown Ballroom</i>	<p>The State of MDIs: The Discourse <i>Sponsored by Kresge Foundation</i></p> <p>Experts will join our research &amp; impact director, Anthony Barr, for a lively conversation about creating social impact, with a focus on access to credit, affordable housing, and climate-related projects.</p> <p>Panel:</p> <ul style="list-style-type: none"> <li>• Anthony Barr, Research &amp; Impact Director, National Bankers Association Foundation (Moderator)</li> <li>• Alicia Wilson, Managing Director &amp; Head of Regional Philanthropy for North America, JPMorganChase</li> <li>• Erika Brice, Social Investment Officer, The Kresge Foundation</li> <li>• Jake Levy, Analyst, VISA Economic Empowerment Institute</li> <li>• John Holdscaw IV, President and CEO, Rochdale Capital</li> <li>• Rey Garcia, Executive Vice President, Texas National Bank</li> </ul>
2:45pm – 3:00pm	Exhibitor Break
3:00pm – 3:30pm <i>Crown Ballroom</i>	<p>The U.S. Economy with Jared Bernstein, Chair, Council of Economic Advisors, The White House <i>Sponsored by FICO</i></p> <p>Join Jared Bernstein, White House Chair of the Council of Economic Advisors, as he explores the current landscape and future outlook of the U.S. economy, addressing key challenges and opportunities for growth.</p> <p>Remarks: Gigi Ligons, Director of Client Services, FICO</p>
3:30pm – 4:00pm <i>Crown Ballroom</i>	<p>Impact Investing Redefined: The Launch of MDI Equity Bonds Initiative</p> <p>This panel will discuss MDI Equity Bonds, an innovative financial instrument aimed at enhancing community resilience while delivering financial returns to investors. Learn how these tools can support MDIs in driving a just climate transition and expanding their impact in critical areas.</p> <p>Panel:</p> <ul style="list-style-type: none"> <li>• Chris White, Deputy Executive Director, National Bankers Association Foundation (Moderator)</li> <li>• Marcus Martin, Head of ESG Advisory &amp; Digital Assets, U.S. Bank</li> <li>• Zoila Jennings, Lead Impact Investment Officer, Robert Wood Johnson Foundation</li> <li>• Rey Ramsey, President &amp; CEO, Nathan Cummings Foundation</li> </ul> <p>Recorded Remarks: William H. Rogers Jr., Chairman &amp; CEO, Truist</p>

	Financial Corporation
4:00pm – 5:00pm <i>Sapphire</i>	<p>Closing Reception &amp; Awards Presentation</p> <ul style="list-style-type: none"> <li>• Presentation of Corporate Excellence Award</li> <li>• Presentation of Kim D. Saunders Women in Banking Award</li> <li>• Presentation of B. Doyle Mitchell, Sr. Trailblazer Award</li> </ul>