



Asset Funders Network

Paving the Road to Financial Security

March 20th and 21st, 2012

Hotel Derek

2525 West Loop South

Houston, Texas

Meeting Framework

This year's meeting of the Asset Funders Network will serve as a forum for a series of in-depth conversations on the grantmaking strategies needed to help protect, rebuild, and grow the assets low-income families lost during the great recession.

Meeting Goals

In recognition of AFN 2012 Strategic Theme of Financial Access and Recovery, the goals of the meeting include:

- Reflecting on the 20 year anniversary of Michael Sherraden's Book "Assets and the Poor" – What have we learned, what is the state of the asset building field, and what does it mean for our grantmaking.
- Discussing a vision for building financial security in America during the next 20 years.
- Engaging in a series of discussions among foundation colleagues regarding policy, practice, innovation, impact, and how we can leverage our influence and resources.
- Discussing how to promote alternatives to bad financial options, supporting integrated service delivery approaches, taking our initiatives to scale, working with the Consumer Financial Protection Bureau, and responding to the income inequality movement.
- Networking and learning from colleagues to inform your grantmaking

Meeting Agenda

Day 1 – March 20th

- 7:30 – 8:30** **Financial Education Roundtable – Invitation Only**
Hosted by Bank of America and Wells Fargo
- 8:00 - 9:00am** **Breakfast**
- 9:00 – 9:30am** **Welcome and Introductions**
➤ **Co-Chair - Annika Little**
➤ **Chair of Planning Committee – Benita Melton – C.S. Mott Foundation**
- 9:30 – 10:45am** **Michael Sherraden – 20 Year Anniversary of his book –**
“Assets and the Poor” – An overview of the creation of
a field and what we have learned over the past 20
years.
- 10:45 – 11:00am** **Break**
- 11:00 – 12:15pm** **Building Financial Security in America: A 2020-2030**
Vision – Lisa Mensah – The Aspen Institute, Initiative on
Financial Security
The next 20 years – A vision to capture both the next
five years and the next 20 years.
- 12:15 – 1:15pm** **Lunch**
- 1:15 – 2:45pm** **Strategic Conversations Series 1**

Working with the Consumer Financial Protection Bureau
Richard Cordray – CFPB Director (Invited)
Gail Hillebrand – Associate Director of Consumer
Education and Engagement
Building a public/private collaboration focused on advancing
a policy and education agenda to rebuild and protect
financial assets in low-income communities.
- 2:45 – 3:00pm** **Break**
- 3:00 – 4:30pm** **Strategic Conversations Series 2**

Opening financial options in low-income neighborhoods

Facilitated by Joyce Klein – FIELD, Aspen Institute

- Daria Sheehan – Citi Foundation
- Manny Hidalgo – Executive Director of Latino Economic Development Corporation

5:00 – 7:30pm

AFN Sponsored Appetizers & Networking

Day 2 – March 21st

7:30 – 8:30am

Breakfast

8:30 – 8:45am

Day 2 Opening Remarks

8:45 – 9:45am

The Income Inequality Movement – The Occupy Movement has raised the volume and profile of income inequality in American. What does this increased attention mean for us, how can we leverage the increased exposure to advance our goals, what can we learn about building a movement, and how do we respond?

- Alan Jenkins – Executive Director of Opportunity Agenda

9:45 – 10:45

Roundtable Discussion - An open discussion among all meeting participants

Advancing asset-building strategies in a rapidly changing social, economic and political environment – What are our strategies, what are the challenges, what are we learning?

10:45 – 11:00am

Break

11:00 – 12:30pm

Strategic Conversations Series 3

Promoting Microenterprise in a tight credit market

Facilitated by Elaine Edgcomb – FIELD, Aspen Institute

- Susan Harper – Bank of America
- Eric Weaver – CEO Opportunity Fund

12:30 – 1:30pm

Lunch

AFN – Building our Capacity to support our members
Grow → Educate → Elevate → Influence

1:30 – 2:30pm

Strategic Conversations Series 4

Integrated Service Delivery – Pulling it all together

Facilitated by Wynne Lum – Bank of America &
Beadsie Woo – The Annie E. Casey Foundation

- Josephine Robinson – United Way Worldwide

2:45 – 4:00pm

Strategic Conversations Series 5

Bringing Asset Building Products and Services to Scale
Facilitated by Living Cities

- Carmen Rojas – Living Cities

4:00 – 4:15pm

AFN Meeting Close

- **Merle Lawrence – Co-Chair - Levi Strauss Foundation**

4:30 to 6:30 pm

Living Cities' Asset and Income Working Group Dinner Meeting