NATIONAL FEDERATION OF COMMUNITY DEVELOPMENT CREDIT UNIONS
2014 ANNUAL CONFERENCE
FINANCIAL INCLUSION IN FOCUS: FROM VISION TO REALITY

WEDNESDAY, MAY 14TH, 2014
9:00 AM - 12:00 PM

PRE-CONFERENCE SESSIONS

- Affordable Homeownership Roundtable
- CDFI Clinic: CU Breakthrough Consultations
- Communicating Arts Credit Union Site Visit and Tour (9:30 AM-11:30 AM)

12:00 PM

LUNCH

Welcome: Michael Duggan, Mayor of Detroit

12:30 PM - 2:00 PM

OPENING PLENARY

LMI Trends and the Opportunities They Present for Credit Unions Through 2020
- Patrick Adams, CEO, St. Louis Community Credit Union
- Rita L. Haynes, CEO Emeritus, Faith Community United Credit Union
- Jonathan Morduch, Professor of Public Policy and Economics, New York University

2:00 PM - 3:30 PM

EARLY AFTERNOON WORKSHOPS

Track 1: Insights: Keeping Up with Evolving Member Expectations
Moderator: Clarissa Ritter, Director of Marketing and Communications, Federation
- Richard Campbell, CFO, Hope Credit Union
- Steve Zuckerman, Executive VP, Self Help Federal Credit Union

Track 2: Innovation: Scalable Products for LMI Members
Moderator: Cynthia Campbell, Director of Innovation Labs, Filene Research Institute
- Mark Lynch, Credit Union Consultant, National Credit Union Foundation
- Jose Miranda, Innovation Manager, Neighborhood Trust Federal Credit Union
- Dave Prosser, VP, Freedom First Credit Union

Track 3: Compliance & Capacity Building: Developing a Non-Profit Affiliate
Moderator: Pablo DeFilippi, VP of Membership and Business Development, Federation
- Sheila Schat, Consultant, CU Breakthrough
- Neil Stevenson, Senior Staff Attorney, Lawyer's Alliance

Special Session: Cultivating New and Emerging Leaders within the CDCU Movement
Moderator: Pamela Owens, VP of Programs, and Jason Chang, Program Associate, Federation
- Monique Dunbar, Cooperative Finance Leader of America Fellow at Credit Union of Atlanta
- Ash Exantus, Cooperative Finance Leader of America Fellow at Urban Upbound Federal Credit Union
- Lauren Hudson, Cooperative Finance Leader of America Fellow at Bethex Federal Credit Union
- Lila Phimmasone, Cooperative Finance Leader of America Fellow at Genesee Co-op Federal Credit Union
- Preeya Saikia, Cooperative Finance Leader of America Fellow at Fidelis Federal Credit Union

3:30 PM - 4:00 PM

EXHIBITOR BREAK

4:00 PM - 5:30 PM

LATE AFTERNOON WORKSHOPS

Track 1: Insights: The Impact of Financial Counseling Through Credit Unions
Moderator: Ann Solomon, Strategic Initiatives Manager, Federation
- Karen Casler, Financial Counseling Manager, CASE Credit Union
- Amber Paxton, Director, Financial Empowerment Center
- Justine Zinkin, CEO, Neighborhood Trust Financial Partners

Track 2: Innovation: Next Wave Financial Management Tools
Moderator: Blake Myers, Consultant, Federation
- Francisco Cervera, Co-Founder & CEO, EMoneyPool
- Sherod Halliburton, CEO, Manatee Community Federal Credit Union
- Jonathan Harrison, CEO, Emerge
- Ian Lampl, Co-Founder & CEO, Loan Street
Track 3: Compliance & Capacity Building: Reflections from Funders on Funding Directions
Moderator: Terry Ratigan, Senior Development Consultant, Federation
- Amy Brown, Program Officer, Ford Foundation
- Benita Melton, Program Officer, Mott Foundation
- Bill Myers, Director, Office of Small Credit Union Initiatives, National Credit Union Association

Special Session- National Cooperative Bank Workshop: Financing Co-ops
Moderator: Eben Sheaffer, CFO, Federation
- Casey Fannon, Senior VP, National Cooperative Bank

6:00 PM- 7:30 PM
Reception
Diego Rivera Court, Detroit Institute of Arts

Thursday, May 15th, 2014
8:00 AM
Breakfast

8:30 AM-9:00 AM
Special Session- Development in Detroit
- David Carroll, VP of Miscellaneous Stuff, Quicken Loans

9:00 AM- 9:45 AM
Morning Plenary
Empowering Americans to Build Their Financial Security
- Michael S. Barr, Professor of Law, University of Michigan

10:00 AM- 11:30 AM
Morning Workshops

Track 1- Insight: The Role of Predictive Analytics
Moderator: Clarissa Ritter, Director of Marketing and Communications, Federation
- Cynthia Campbell, Director of Innovation Labs, Filene Research Institute
- Scott Graffius, Direct Marketing Analytics Manager, Credit Union National Association Mutual Group
- Jay Nadboralski, Senior Manager, Credit Union National Association Mutual Group

Track 2- Innovation: Integrating Financial Services into Social Service Delivery
Moderator: Tanya Ladha, Manager, Advisory Services, Center for Financial Services Innovation
- Gregg Brown, President/CEO, Southside Community Federal Credit Union
- Jeannine Esposito, Communications and Development Associate, Self Help Federal Credit Union
- Margaret Libby, Executive Director, Mission SF Community Financial Center
- Ayom Siengo, Manager of Economic Development, The Community Builders
- Paul Woodruff, VP of Community Development, St. Louis Community Credit Union

Track 3- Compliance & Capacity Building: Regulatory Updates and Current Issues from National Credit Union Association
Moderator: Jamie Howell, Compliance Consultant, Credit Union Solutions Group
- Larry Schoeberl, Supervision Analyst, National Credit Union Administration
- Jason Schultz, Consumer Access Analyst, National Credit Union Administration
- David Sieminski, Policy Analyst, Consumer Financial Protection Bureau

Special Session- CDCU Risk Institute: Risk Management for Small and Faith-Based Credit Unions
Moderator: Pamela Owens, VP of Programs, Federation
- W. Kent Hartzler, Everence Federal Credit Union
- Mark A. Regier, Everence Financial

12:00 PM
Lunch

12:00 PM- 12:30 PM
Special Presentation
- Mary Dunn, Senior VP and Deputy General Counsel, Credit Union National Association
- Janet B. McDonald, Senior Sales Market Manager, CUNA Mutual Group

12:30 PM- 1:30 PM
Lunch Plenary
Serving Immigrant Communities
- Deyanira Del Rio, Co-Director, New Economy Project
- Ann Baddour, Senior Policy Analyst, Texas Appleseed
- Luis Pastor, CEO, Latino Community Credit Union

1:30 PM- 2:00 PM
Exhibitor Break
2:00 PM- 3:30 PM  
**Afternoon Workshops**

**Track 1: Insights - The Power of State CDFI Coalitions**
Moderator: Hank Hubbard, CEO, Communicating Arts Credit Union
- Tristram Coffin, CEO, Alternatives Federal Credit Union
- Seth Julyan, VP Membership, Opportunity Finance Network

**Track 2: Innovation: Core Banking and the Needs of the LMI Market**
Moderator: Mignhon Tourne, CEO, ASI Federal Credit Union
- Kevin Burke, Director of IT, ASI Federal Credit Union
- Teri Robinson, CEO, Pacific NorthWest Federal Credit Union

**Track 3: Compliance & Capacity Building: Red Flag Warnings - What Every CEO Should Know**
Moderator: Pamela Owens, VP of Programs, Federation
- Robin Romano, CEO, MariSol Federal Credit Union

**Special Session - CDFI Certification - Building Blocks of Sustainable Growth**
- Pablo DeFilippi, Director of Membership, Federation
- Terry Ratigan, Senior Development Consultant, Federation

4:00 PM- 5:00 PM  
**Regional Caucuses**

6:00 PM- 7:30 PM  
**Reception**

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**Friday, May 16th, 2014**

**8:00 AM**  
**Breakfast**

**8:30 AM- 9:00 AM**  
**Special Presentation: Dennis Nolan, Acting Director, Community Development Financial Institutions Fund**

**9:00 AM- 10:30 AM**  
**Morning Plenary**

*The Financial Lives of Low-Income Consumers*
- Alex Horowitz, Research Manager, The Pew Charitable Trusts
- Kirsten Moy, Director of Scale Initiatives, Aspen Institute
- Lisa Servon, Professor, The New School for Public Engagement

**10:45 AM- 12:00 PM**  
**Morning Workshops**

**Track 1: Insights: Behavior-Driven Asset Building Strategies**
Moderator: Clarissa Ritter, Director of Marketing and Communications, Federation
- Jessica DeMorest, Project Manager, Credit Union Solutions
- Shira Markoff, Senior Program Manager, CFED

**Track 2: Innovation: Meeting the Financial Needs of Immigrants**
Moderator: Gregory Schiefelbein, Senior VP, Citi Community Development
- Jason Chang, Program Associate, Federation
- Sarah Marshall, Marketing and Partnerships Manager, North Side Community Federal Credit Union
- Winona Nava, CEO, Guadalupe Credit Union
- Marisabel Torres, Policy Analyst, National Council of La Raza

**Track 3: Compliance & Capacity Building: Ramping Up Your Lending**
Moderator: Eben Sheaffer, CFO, Federation
- Richard W. Guillot, CEO, Business Alliance Financial Services
- Randy Thompson, CEO, Thompson Consulting and Training

**Special Session - Strategic Planning: The Foundation of a Successful CDFI Application**
- Pablo DeFilippi, Director of Membership, Federation
- Terry Ratigan, Senior Development Consultant, Federation
- Scott Butterfield, Strategic Planning Consultant, Your Credit Union Partner

**12:00 PM- 1:00 PM**  
**Business Meeting**

**1:00 PM- 2:30 PM**  
**Annie Vamper Awards Luncheon**
Awardee: Rita L. Haynes, CEO Emeritus, Faith Community United Credit Union

**3:00 PM**  
**Conference Adjourned**