

Bank On National Conference Agenda

May 28, 2025
National Press Club

- 8:30 – 9:00 AM** **Registration and Breakfast**
- 9:00 – 9:15 AM** **Welcome Remarks: Reflecting on A Decade of Bank On Partnerships**
Jonathan Mintz, President and Chief Executive Officer, Cities for Financial Empowerment Fund
- 9:15 – 9:30 AM** **Sponsor Spotlight**
Jennifer Roberts, Chief Executive Officer, Chase Consumer Banking
- 9:30 – 10:15 AM** **Supercharging Partnerships and Facilitating Supply: Collaborating for Greater Impact in Banking Access and Financial Institution Engagement**
- **Kelvin Chen**, Head of Policy, Consumer Bankers Association (Moderator)
 - **Naomi Camper**, Chief Policy Officer, American Bankers Association
 - **Shanelle Smith Whigham**, Senior Vice President & National Community Engagement Director, KeyBank
 - **Shannah Stephens**, Senior Vice President - Community Banking Strategy Executive, Bank of America
- 10:15 – 10:30 AM** **Break**
- 10:30 – 10:45 AM** **Bank On Stories**
- **Sarah Byrne**, Partner, Moore & VanAllen PLLC
 - **Hollie Nadel**, Survivor Leadership Program Coordinator, The Human Trafficking Legal Center
- 10:45 – 11:30 AM** **Supercharging Partnerships and Growing Demand: Opportunities for Greater Impact in Scaling Access with 500 Accounts**
- **Marco A. Chavarín**, Senior Vice President, Citi Community Investing and Development (Moderator)
 - **Santiago Sueiro**, Senior Policy Analyst, Economic Policy Team, UnidosUS
 - **Erin Coltrera**, MSW, MSSP, Principal Program Manager, AidKit
 - **Elizabeth Ortiz**, Deputy Director, Consumer and Community Affairs, Division of Depositor and Consumer Protection, Federal Deposit Insurance Corporation
 - **Ben Joergens**, Financial Empowerment Director, VP, Old National Bancorp
- 11:30 AM – 12:15 PM** **Keynote Address**
Senior Deputy Comptroller for Bank Supervision Policy Grovetta N. Gardineer, Office of the Comptroller of the Currency
- 12:15 – 1:15 PM** **Lunch**
- 1:15 – 1:30 PM** **Bank On Stories & Sponsor Spotlight**
- **Bonnie Wallace**, SVP, Head of Financial Health Philanthropy, Wells Fargo Foundation
 - **Raya Boyte-Starnes**, Community Impact Associate & Bank On Fellow, United Way of Northeast Louisiana, Bank On Northeast Louisiana
 - **Jessica Howell**, M.Ed., Bank On Fellow & Director of Community Engagement, Dress for Success Phoenix, Bank On Arizona
- 1:30 – 2:30 PM** **Breakout Sessions: Leveraging Partnerships for Supercharged Account Access**
These breakout sessions will focus on common technical challenges in connecting people to Bank On products, and how partners from across sectors have overcome them to meaningfully expand banking access.
- **Breakout 1: Account Opening Issues and Solutions**
This session will highlight how direct partnerships with financial industry partners can substantively solve account access issues for unbanked households.
 - **Adeeb Mahmud**, Chief Program Officer, Financial Health Network (Moderator)
 - **Patrick Basler**, Chief Experience Officer, Great Lakes Credit Union
 - **Brenda Bruce**, Director, Product Line Manager, FIS
 - **Sarah Roberts-Stephens**, AVP, Community Engagement, Tinker Federal Credit Union
 - **Breakout 2: Program Integrations**
This session will detail how government partners, financial institutions, community-based organizations, and others have worked together to integrate banking access seamlessly into a range of social service programs.

- **Constance Alberts**, Program Director, Urban Economic Development Association of Wisconsin, Bank On Greater Milwaukee (Moderator)
- **Sarah Campagna**, Managing VP, Financial Empowerment, Summit Credit Union
- **Rachel Rodri**, Acting Bank On Program Manager, City of Boston Worker Empowerment, Bank On Boston
- **Gillian Gillett**, Chief, Division of Data & Digital Services, California Department of Transportation
- **Breakout 3: Account Access for Hardest to Reach Populations**
This breakout showcases how strategic partnerships create transformative banking access solutions for the hardest-to-reach populations, demonstrating both successful outcomes and the collaborative journeys that make them possible.
 - **Tracy Frizzell**, Executive Director, Economic Awareness Council, Bank On Chicago (Moderator)
 - **Diana Cervantes**, VP, Social Impact, Rize Credit Union; Executive Director, Center for Financial Empowerment
 - **Javier Janik**, Program Manager for Economic Opportunity and Investment, Neighborhood Allies, Bank On Allegheny County
 - **Chandria Hargrove**, Director of Supportive Services, OIC Philadelphia

2:30 – 3:30 PM

Breakout Sessions: Leveraging Partnerships for Supercharged Impact Measurement and Sustainability

These breakout sessions will highlight approaches Bank On partners are taking to advance movement efforts: through different championship models, related financial institution products, and innovative uses of data.

- **Breakout 1: Different Championship Models**
This breakout details how leaders and coalitions are using partnerships to champion banking access, highlighting different models to cultivate and deploy these champions across sectors.
 - **April Atkins**, Community Affairs Officer, Office of the Comptroller of the Currency (Moderator)
 - **Yahaira Hayle-Laboy**, Local Government Manager, Rochester Financial Empowerment Center; Coalition Manager, Bank On Rochester
 - **Carmina Lass**, Director, Colorado Attorney General's Office of Financial Empowerment, Bank On Colorado
 - **Mark Smith**, JD, Manager of Financial Security, United Way Suncoast, Bank On Suncoast
- **Breakout 2: Connected Products**
This session will highlight how Bank On accounts are catalyzing financial institution investment in related financial products, spurred on by community and coalition partnerships and inspired by the strongly recommended features section of the National Account Standards.
 - **Brenton Peck**, Vice President, Financial Health Strategy, U.S. Bank (Moderator)
 - **Justine Lotridge**, Vice President, Consumer Checking Product – Liquidity Solutions, U.S. Bank
 - **Jeremy Munden**, CRA Community Development Innovation Specialist, First National Bank Texas
 - **Jacqueline Boles**, SVP, Director of Retail Banking, Industrial Bank
 - **Darren Easton**, Director of Inclusive Segments, BMO U.S.
- **Breakout 3: Data Innovation**
This breakout details how data is unveiling new insights into the banking access field and Bank On movement.
 - **Cherilyn Richardson**, Bank On Senior Associate, CFE Fund (moderator)
 - **Lisa Locke**, Community Development Advisor, Federal Reserve Bank of St. Louis
 - **Matt Brady**, Project Specialist & Bank On Fellow, Bank On CLE
 - **Julia Breitman**, Assistant Commissioner for Workforce Development, NYC Department of Youth & Community Development

3:30 – 3:45 PM

Break

3:45 – 4:00 PM

Bank On Stories

Vanessa Arballo, Program Manager, City of Albuquerque, Bank On Burque

4:00 – 4:15 PM

Closing Remarks: Why Banking Access Matters

Darrin Williams, CEO, Southern Bancorp, Inc.

4:15 – 6:00 PM

Reception