



2018 AMBA FALL WORKSHOP

AUGUST 19 – 22, 2018 ▪ WILLARD INTERCONTINENTAL HOTEL, WASHINGTON D.C.

SUNDAY, AUGUST 19, 2018

4:30 PM	6:30 PM	Workshop Registration – <i>Ballroom Lobby</i>
7:00 PM	9:00 PM	Welcome Networking Reception – <i>Crystal Ballroom</i>

MONDAY, AUGUST 20, 2018

7:00 AM	4:00 PM	Workshop Registration – <i>Ballroom Lobby</i>
7:00 AM	8:00 AM	Continental Breakfast and Networking– <i>Ballroom Foyer</i>
8:00 AM	4:00 PM	Workshop Program – <i>Ballroom</i>
8:00 AM	8:15 AM	Opening Remarks: Mr. James Cerrone, Chairman, AMBA and Mr. Steven J. Lepper, President & CEO, AMBA Posting of Colors: Randolph-Macon Academy National Anthem and Pledge of Allegiance Invocation, Mr. Jim Cerrone, Chairman, AMBA
8:15 AM	9:15 AM	<u>Financial Regulator Panel Discussion</u> Moderator – Mr. Rob Rowe , VP & Associate Chief Counsel, American Bankers Association Ms. Donna Murphy , Deputy Comptroller for Compliance Risk Policy, Office of the Comptroller of the Currency Ms. Doreen R. Eberley , Director, FDIC Division of Risk Management, Federal Deposit Insurance Corporation Ms. Amy Henderson , Assistant Director for Consumer Laws and Regulations, Federal Reserve Board Mr. Patrick Campbell , Acting Assistant Director, Bureau of Consumer Financial Protection, Office of Servicemember Affairs
9:15 AM	9:30 AM	Break and Networking – <i>Ballroom Foyer</i>
9:30 AM	10:30 AM	<u>AMBA Member & Partner Legislative Landscape Panel</u> Ms. Aniel Szymanski , Government Relations Director, Reserve & National Guard, Veterans Benefits, Military Officers Association of America Ms. Erin Martinko , Assistant Vice President, Federal Government Relations, USAA Ms. Joyce Wessel-Raezer , Executive Director, National Military Family Association
10:30 AM	10:45 AM	Break and Networking – <i>Ballroom Foyer</i>
10:45 AM	11:30 AM	<u>Behavioral Economics: Ten Ubiquitous Young Adult Trends Too Big to Ignore</u> Ms. Regina Lewis , Media Contributor & Consultant
11:30 AM	1:00 PM	<u>AMBA Workshop Luncheon: Presentation of America Saves Designation of Excellence</u> Presented by Mr. George Barany , Director, America Saves – <i>Pierce Room</i>
1:00 PM	2:00 PM	<u>Legal & Compliance Panel Discussion</u> Moderator - Mr. Chris Cole , Executive Vice President and Senior Regulatory Counsel, Independent Community Bankers of America Ms. Nessa Feddis , SVP & Deputy Chief Counsel for Consumer Protection & Payments, American Bankers Association Ms. Natasha Dempsey , Bank Counsel Regulatory Team, USAA Mr. Sasha Leonhardt , Counsel, BuckleySandler LLP
2:00 PM	2:30 PM	Break and Networking – <i>Ballroom Foyer</i>

Agenda as of 14 August 2018

2:30 PM	3:45 PM	DoD Military Banking Program Panel Discussion Mr. Bill E. Hawbecker , Director, DoD Banking and Credit Union Office, Defense Finance and Accounting Service Mr. Dean Hunstad , Department of Navy Mr. David Fuqua , Marine Corps Mr. Robert Burke , Department of Air Force CPT Jennifer Evans , Department of Army
3:45 PM	4:00 PM	Day One Wrap-Up , Mr. Steve Lepper, President & CEO, AMBA
4:00 PM	5:00 PM	Bank Liaison Officer Training Breakout Session – Taylor Room
4:00 PM	5:00 PM	AMBA General Membership Meeting (AMBA Regular Corporate Members)
5:00 PM	6:30 PM	Break
6:30 PM	7:00 PM	Networking Reception – <i>Crystal Ballroom</i>
7:00 PM	10:00 PM	Banquet Dinner – <i>Willard Room</i>

TUESDAY, AUGUST 21, 2018

7:00 AM	4:00 PM	Workshop Registration – <i>Ballroom Lobby</i>
7:00 AM	8:00 AM	Continental Breakfast and Networking– <i>Ballroom Foyer</i>
8:00 AM	5:00 PM	Workshop Program – <i>Ballroom</i>
8:00 AM	8:15 AM	General Session Welcome Remarks: Mr. Steve Lepper, President & CEO, AMBA
8:15 AM	9:15 AM	<u>Military Personal Financial Survey Data</u> Mr. Andy Cohen , Director, Financial Readiness, Office of the Deputy Assistant Secretary of Defense (Force Education & Training) Ms. Shannon Razsadin , Executive Director and Dr. Shelley Kimball , Military Family Advisory Network Ms. Melissa Murray , ABA Foundation Dr. Gary Mottola , Military Financial Readiness, FINRA Investor Education Foundation
9:15 AM	10:15 AM	<u>Veteran & Military Spouse Entrepreneurship Panel</u> Moderator - Mr. Brendon Dibella , VP of Development & Strategy, StreetShares Ms. Lakesha Cole , Military Spouse Entrepreneur Mr. and Mrs. Shane and Melissa Underwood , Veteran Entrepreneurs
10:15 AM	10:30 AM	Break and Networking – <i>Ballroom Foyer</i>
10:30 AM	11:15 AM	<u>Why We Serve</u> Dr. Mary Keller , President & CEO, Military Child Education Coalition
11:15 AM	12:45 PM	<u>AMBA Workshop Luncheon and Military Departments' 2017 Distinguished Bank Service Awards Presentation:</u> Mr. Mark Easton , Deputy Chief Financial Officer, Department of Defense – <i>Pierce Room</i>
12:45 PM	1:00 PM	Break and Networking – <i>Ballroom Foyer</i>
1:00 PM	2:00 PM	<u>Military Banks, Defense Credit Unions and AFFN Partnership & Teamwork</u> Mr. Steve Lepper , President & CEO, Association of Military Banks of America Mr. Tony Hernandez , President & CEO, Defense Credit Union Council Mr. John Broda , President & CEO, Armed Forces Financial Network
2:00 PM	2:45 PM	<u>Using Big Data to Develop Better Savings Products</u> Ms. Nashila Somani-Ladha , Senior Innovation Manager, Commonwealth Mr. Brian Clarke , Senior Business Strategy Manager Regional & Community Outreach, Federal Reserve Bank of Boston Mr. George Barany , Director, America Saves
2:45 PM	3:00 PM	Break and Networking – <i>Ballroom Foyer</i>
3:00 PM	3:45 PM	<u>The Economy and Principles of Military Financial Education</u> Mr. Chris Calmer , CPA® CFA® SVP/Institutional Portfolio Manager, UMB Bank Ms. Darlene Goins , SVP, Hands on Banking, Wells Fargo Bank
3:45 PM	4:00 PM	<u>AMBA Workshop Action Items/Closing Remarks:</u> Andy Trovillion, Chairman, AMBA and Steven J. Lepper, President & CEO, AMBA

4:00 PM	5:00 PM	Installation Real Estate Discussion Mr. Clayton Redmond , Director of Real Estate, Army Corps of Engineers (<i>invited</i>) Ms. Traci Hajducsek , Realty Specialist, Department of Navy Real Estate Ms. Nikki Hunt , Realty Specialist, Department of Navy Real Estate
5:00 PM	6:30 PM	Break
6:30 PM	8:30 PM	Farewell Networking Reception – <i>The Nest</i>

WEDNESDAY, AUGUST 22, 2018

All Day		<i>Check-out and Departure</i>
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Agenda as of 14 August 2018