



2020 AMBA *Virtual* FALL WORKSHOP

Military Lifecycle Banking

MONDAY, AUGUST 31 – TUESDAY, SEPTEMBER 1, 2020

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Live Morning Sessions 10:00 AM - 12:00 PM

- 10:00 AM** **Welcome and Opening Remarks: VADM (Ret.) John Bird**, AMBA Chairman, and **Maj Gen (Ret.) Steven. J. Lepper**, AMBA President & CEO
- 10:10 AM** **Financial Regulator Perspectives**
Moderator – **Mr. Rob Rowe**, Vice President & Senior Counsel, Regulatory & Consumer Compliance, American Bankers Association
Ms. Grovetta Gardineer, Deputy Comptroller for Compliance Risk Policy, Office of the Comptroller of the Currency - *invited*
Ms. Doreen R. Eberley, Director, FDIC Division of Risk Management, Federal Deposit Insurance Corporation
Ms. Suzanne Killian, Senior Associate Director; Board of Governors, Division of Consumer and Community Affairs, Federal Reserve Board
- 11:00 AM** **Military Service Organization/Veteran Service Organization Perspectives**
Lt Gen (Ret.) Dana Atkins, President & CEO, Military Officers Association of America
Mr. Ashish Vazirani, Executive Director & CEO, National Military Family Association
Ms. Shannon Razzadin, Executive Director, Military Family Advisory Network
- 11:45 AM** **Presentation of Military Saves Designation of Savings Excellence** – Presented by **Ms. Angela Caban**, Director, Military Saves

Live Afternoon Sessions 2:00 PM – 4:00 PM

- 2:00 PM** **Banking Associations Perspectives**
Mr. Chris Cole, Executive Vice President and Senior Regulatory Counsel, Independent Community Bankers of America
Mr. Rob Rowe, Vice President & Senior Counsel, Regulatory & Consumer Compliance, American Bankers Association
Maj Gen (Ret.) Steve Lepper, President & CEO, Association of Military Banks of America
- 2:45 PM** **DoD Military Banking Program Panel Discussion**
Mr. Bill E. Hawbecker, Director, DoD Banking and Credit Union Office, Defense Finance and Accounting Service
Mr. John Wynn, Department of Navy
Mr. David Fuqua, Marine Corps
Mr. Robert Burke, Department of Air Force
CPT Jennifer Evans, Department of Army
- 3:50 PM** **Day one wrap-up: Maj Gen (Ret.) Steven J. Lepper**, President & CEO, AMBA

Monday Special Sessions – Invitation only

- 4:00 PM** **AMBA General Membership Meeting**
4:00 PM **Bank Liaison Officer Training**

Live Morning Sessions 10:00 AM - 12:00 PM

- 10:00 AM** **Day Two Welcome Remarks: Mr. Steven J. Lepper**, President & CEO, AMBA
- 10:10 AM** **Savings & Retirement Planning**
Ms. Angela Caban, Director, Military Saves
Ms. Mei-Shan (Jo) Kammer, TSP Training and Liaison Specialist, Federal Retirement Thrift Investment Board (TSP)
Ms. Beth Foster, Military Legislative Assistant, U.S. Senator Patty Murray
- 11:00 AM** **Financial Education**
Mr. Corey Carlisle, Executive Director, ABA Foundation
Mr. JJ Montanaro, Relationship Director, Military Advocacy Group, USAA
Mr. Ken Morris, President and Founder, Lightbulb Press

Live Afternoon Sessions 2:00 PM – 4:00 PM

- 2:00 PM** **Presentation of Military Departments’ 2019 Distinguished Bank Service Awards** – Presented by the Military Services
- 2:30 PM** **Military and Veteran Community Perspectives**
Dr. Shelley Kimball, Senior Director of Research and Program Evaluation, Military Family Advisory Network
Mr. Andrew Cohen, Director, Financial Readiness, Office of the Under Secretary of Defense (Personnel and Readiness)
Mr. Jim Rice, Assistant Director, Consumer Financial Protection Bureau - Office of Servicemember Affairs
- 3:15 PM** **Military Retirement & Transition**
Mr. Peter Cook, EVP & Chief Communications Officer, American Bankers Association
Mr. Eric Eversole, President, Hiring Our Heroes
Col (Ret.) Heather LoBue, Counsel, Regulatory Enforcement and Internal Investigations, Wells Fargo Legal Department
- 3:45 PM** **AMBA Workshop Action Items/Closing Remarks:**
VADM (Ret.) John Bird, Chairman, AMBA and **Maj Gen (Ret.) Steven J. Lepper**, President & CEO, AMBA

Prerecorded Sessions

Veterans Benefits & Military Banking

Mr. Joe Gurney, Senior Advisor (Fiscal Responsibility), Veterans Benefits Administration
CAPT (Ret.) Jeffrey Cathey, Senior Military Affairs Executive, Bank of America

Lending & Credit

Mr. Tom Quinn, Vice President of Scoring, FICO

Why We Serve

Brig Gen (Ret.) David C. Wesley, President, Randolph-Macon Academy