

2017 CDBA Peer Forum and Membership Meeting Agenda

Arnold & Porter LLP
601 Massachusetts Ave NW
Paul Porter Conference Center – 11th Floor
Washington DC 20001

CDBA Peer Forum Agenda – Day One

1st Day **Wednesday, May 31, 2017**

8:00 am **Registration & Continental Breakfast**

8:30 am **Introductions & Review of Agenda**

9:00 am **Mission as Competitive Advantage**

Panelists will discuss how their institutions have used their CDFI status as a differentiator within their local markets to attract new customers. Panelists will discuss how being a CDFI can transform your bank and value proposition from being transactional to transformational.

Panelist: Bill Dana (Central Bank of Kansas City), Kent Curtis (First Southwest Bank), B. Doyle Mitchell (Industrial Bank), Jane Henderson (Virginia Community Capital Bank)

10:00 am **Perspectives on the New Environment in Washington**

The policy environment in Washington DC has changed radically with the Trump Administration and new Congress. An esteemed panel of experts will offer their observations on the outlook for statutory and regulatory reform of financial service, housing, appropriations and tax policy.

Panelists: Palmer Hamilton (Jones Walker), James Ballentine (American Bankers Association), Michael Stegman (Bipartisan Policy Center), Bob Rapoza (Rapoza Associates), Myra Miller (Winston Group)

Panel sponsored by Jones Walker LLP

11:15 am **15 minute break**

11:30 am **Fintech and CDFI Bank Partnerships**

FinTech is rapidly changing the landscape of financial services. FinTech firms have the potential to be both new competitors, as well as collaborators that have help serve customers in new ways. CDFI Bank

practitioners will discuss findings and best practices for their partnerships with FinTech companies.

Panelists: Lori Bettinger (BancAlliance) (moderator), Kat Taylor (Beneficial State Bank), Melanie Stern (Spring Bank), Marcus Robinson (PriorityOne Bank).

Panel sponsored by BancAlliance

12:30 pm Lunch

1:30 pm Innovation Lab (Interactive Small Group Discussion)

A select group of CDFI banks working on product, services or systems innovations will each do a 2-minute pitch on their new offerings. Attendees will break into small discussion groups to give feedback and recommendations on their products and delivery strategies.

3:00 pm 15 minute break

3:15 pm Creating an Innovation Culture

Rapid change is the new normal in financial services. How can a small bank serving a low-income community constantly stay on the cutting edge? Panelists will discuss how to create a culture of innovation.

Panelists: David Reiling (Sunrise Banks)(moderator), Dennis Amman (Peoples Bank), Jie Wang (Promontory Interfinancial Network), Joshua Sledge (Center for Financial Services Innovation)

Panel sponsored by Promontory Interfinancial Network

4:30 pm Membership Meeting

Treasurers Report
Board Elections
Membership Survey

5:00 pm Keynote Speaker: Mark Calabria, Chief Economist, White House Office of the Vice President

Mr. Calabria will discuss the Trump Administration's priorities for financial institutions policy reform and regulatory relief.

5:30 pm Adjournment

6:30 pm Cocktail Reception – The Source

7:30 pm Dinner – The Source

CDBA Peer Forum Agenda – Day Two

2nd Day **Thursday, June 1, 2017**

7:30 am **Continental Breakfast**

8:00 am **Keynote Speaker: Craig Phillips, Counselor to the Secretary, US Department of the Treasury**

8:45 am **Keynote Speaker: Annie Donovan, Director, CDFI Fund, US Department of the Treasury**

9:45 am **Telling the CDFI Bank Story (Breakout Discussion Groups)**

CDBA is embarking on an initiative to raise the profile of the CDFI banking sector. Marketing expert Liz Wainger will share the findings of her research on the sector and recommendations. Smaller breakout groups will discuss strategies for enhancing the CDFI bank sector and individual banks' profile nationally and within local communities.

11:00 am **15 minute break**

11:15 am **Keynote Speaker: Congressman John Delaney (D-MD), Member of House Financial Services Committee**

11:45 pm **Lunch Speaker: Richard Cordray, Director, Consumer Financial Protection Bureau**

12:45 pm **CDFI Banks and the Federal Home Loan Banks**

The panel will discuss the resources available through the FHLBs to enhance CDFI banks' ability to serve low-income communities.

Panelists: Art Fleming (FHLB Atlanta), Greg Hettrick (FHLB Dallas), David Johnson (BankPlus), Robert James (Carver State Bank)

Panel sponsored by Atlanta FHLB and Dallas FHLB

1:45 PM **Discussion of Proposed Section 1071 Small Business Reporting and How it Can Work for CDFI Banks and their Communities** (led by Grady Hedgespeth, Assistant Director, Small Business Lending markets, Consumer Financial Protection Bureau)

A facilitated discussion between CDFI banks and CFPB representatives on implementation of Section 1017, which will create HMDA-like reporting for small business lending. The session is an opportunity to discuss how Section

1017 can be implemented in a manner that maximize benefit to communities while minimizing burden and risk for lenders.

3:00 pm

Secret Sauce: Best Lessons Learned in Applying to the CDFI Fund

A panel of CDFI bankers and advisors will share best practices, tips and advice on how to prepare and succeed in competing for awards, as well as how to manage expectations at your bank.

Panelists: Manjima Bose (Fund Consulting), Ben Sones (FI Strategies), Dawn Reiff (Community Funding Advisors), Saurabh Narain (National Community Investment Fund)

4:15 pm

Wrap Up & Adjournment