



Northwest Regional Conference on Reaching Unbanked People Working Together to Move People Ahead

**Seattle, Washington
March 27, 2007
9:00 a.m. – 4:30 p.m.**

AGENDA

8:00 Doors Open for Sign-In and Coffee

9:00 **Welcome and Conference Overview**

Mr. Scott Kinney Director of Communications
Washington State Department of Financial Institutions

Mr. Dan Iannicola, Jr., Deputy Assistant Secretary for Financial Education
US Department of the Treasury

Mr. John F. Carter, Regional Director, San Francisco Region
Federal Deposit Insurance Corporation

9:25 **Regional and Local Perspectives Panel**

Moderator: Mr. Craig Nolte, Regional Manager for Community Development
Federal Reserve Bank of San Francisco

- Ms. Janet Byrd, Executive Director
The Neighborhood Partnership Fund
- Ms. Loretta Moesta, Chief Executive Officer
OUR Federal Credit Union
- Ms. Lena Robinson, Regional Manager for Community Development
Federal Reserve Bank of San Francisco
- Mr. Dave Sieminski, Manager
Asset Development Programs, United Way of King County

10:40 Break

10:55 **Featured Speakers**

Mr. Kerry Killinger, Chairman and Chief Executive Officer
Washington Mutual Inc.

Mr. Rodney Hood, Vice Chairman
National Credit Union Administration

11:25 **Discussion of Morning Presentations**

11:45 Networking Lunch

1:00 **Effective Models and Practices for Reaching the Unbanked Panel**

Moderator: Ms. Louisa Quittman, Director, Community Adjustment and Investment Program
US Department of the Treasury

- Mr. Tom Berquist, Vice President of Marketing, BECU
- Ms. Claudia Lopez, Assistant Vice President, Cashmere Valley Bank
- Mr. Gabe Mello, Asset Services Coordinator, Juma Ventures
- Ms. Tricia McKay, Executive Director, Medina Foundation

2:15 **Small Group Roundtable Discussions**

Participants will select a group discussion from the following topics:

- What partnerships, roles, and steps are needed to develop a comprehensive local model to reach the unbanked?
- What steps can be made to reach recent immigrants who are unbanked?
- What innovative products, services and technologies can be used to reach unbanked people?
- What steps can be taken to reach youth/young people who are unbanked?

3:25 Break

3:40 **Report Back and Moderated Discussion**

4:15 **Closing Thoughts and Next Steps**

Mr. Dan Iannicola, Jr., US Department of the Treasury