



Wednesday, June 4 th	
Registration	8:00 am–5:00 pm
Morning	8:30 am–12:00 pm United Way Financial Stability Partnership Steering Committee Meeting
Afternoon	12:00--2:00 pm Bank of America Grantee Luncheon 3:00--5:00 pm Opening General Session <i>Financial Stability in Unstable Times</i> Setting the Stage Barbara Ehrenreich Author, <i>Nickel and Dimed: On (Not) Getting By in America</i> Thought Leaders Roundtable A panel discussion featuring: Brian Gallagher President and CEO, United Way of America Dale Bonner Secretary, Business, Transportation and Housing, State of California Stacey Davis Stewart Senior Vice President, Office of Community and Charitable Giving, Fannie Mae Corporation Jean F. Duff, M.A. M.P.H. Deputy Director, Global Justice and Global Poverty Programs Center for Global Justice and Reconciliation, Washington National Cathedral Linda Gibbs Deputy Mayor of Health and Human Services, New York City Ryan Streeter, PhD Senior Advisor, Business Civic Leadership Center, U.S. Chamber of Commerce Vice President, Civic Enterprises, LLC Andrew Plepler President, Bank of America Charitable Foundation
Evening	5:30–7:30 pm Reception



Thursday, June 5 th	
Registration	8:00 am– 5:00 pm
Morning	<p>8:00--8:30 am Continental Breakfast</p> <p>8:30--9:30 am Opening General Session <i>Partner Remarks</i> Andrew Plepler President , Bank of America Charitable Foundation</p> <p><i>Keynote Speaker</i> Brian Gallagher President and CEO, United Way of America</p> <p>9:30--10:00 am Networking Break</p> <p>10:00--11:15 am Mini-Plenary Sessions <i>Getting Through the Mortgage Mess</i> COLUMBUS AB Suzanne Boas, President, Consumer Credit Counseling Service of Greater Atlanta Bruce Gottschall, Executive Director, Neighborhood Housing Services of Chicago Traci Wickett, President, United Way of Southern Cameron County</p> <p><i>Transforming the Financial Services Industry: Lessons Learned from Alternative Financial Providers</i> COLUMBUS CD Jason Sabo, Senior Vice President, Public Policy, United Ways of Texas Jennifer Tescher, Director, Center for Financial Services Innovation</p> <p><i>Financial Education: Critical Yet Challenging</i> COLUMBUS EF Ted Beck, President & CEO, National Endowment for Financial Education Karen Murrell, Senior Research Fellow, Asset Building Program, New America Foundation Jeryllyn Stowe, Community Impact Manager, Improving Financial Stability, United Way of Salt Lake</p> <p>11:15--11:30 am Break</p> <p>11:30 am--12:15 pm Coffee Chats COLUMBUS AB – COLUMBUS KL Networking and small-group discussion opportunities</p>
Afternoon	<p>12:30--2:00 pm Luncheon General Session <i>Partner Remarks</i> Marc Ferguson CEO and Founder, Nets to Ladders</p> <p><i>Luncheon Speaker</i> Martin Gruenberg Vice Chairman, FDIC</p> <p>2:00--2:30 pm Networking Break</p> <p>2:30--3:45 pm Mini-Plenary Sessions <i>Economic Realities: Balancing Spend vs. Save</i> COLUMBUS AB William Emmons, Supervisory Officer and Economist, Division of Banking Supervision and Regulation, Federal Reserve Bank of St. Louis Paula Gilberto, Senior Vice President, Community Investment, United Way of the Capital Area David Marzahl, President, Center for Economic Progress</p> <p><i>Drowning in Debt: Why Are We in so Deep and How Do We Get Out?</i> COLUMBUS CD Tamara Draut, Director, Economic Opportunity Program, DEMOS Gloria King, President, United Way of Central Carolinas</p>



	<p><i>Does it Pay to Work? The Critical Role of Work Supports</i> COLUMBUS EF Jane Fogg, Director, Financial Stability, United Way of Central Iowa Ellen Galinsky, President, Families and Work Institute</p> <p>3:45–4:00 pm Break</p> <p>4:00–5:15 pm Best, Promising and Emerging Strategies</p> <p><i>Utilizing Social Marketing Campaigns to Promote Financial Stability</i> COLUMBUS AB Jill Cox, Director, Government Relations, United Way of North Carolina Peter Hahn, Director, Creative Studio, United Way of America Nancy Register, Associate Director, Consumer Federation of America</p> <p><i>Tools for Expanding EITC/VITA Campaigns</i> COLUMBUS CD Carol Barnett, Director, Product & Partnership Development, SPEC Division, IRS Mary Dupont, Executive Director, Nehemiah Gateway Community Development Corporation Eric Seto, Executive Director, Louisville Asset Building Coalition John Wancheck, Coordinator, Earned Income Tax Credit Outreach Campaign, Center on Budget and Policy Priorities</p> <p><i>Strategies to Help Families Facing Foreclosure</i> COLUMBUS EF Bill Sullivan, Director, 2-1-1, United Way for Southeastern Michigan Mark Weisman, Director, Cuyahoga County Foreclosure Prevention Program Elvio Serrano, Executive Vice President, United Way of Palm Beach County</p> <p><i>Promising Products and Services for Underbanked Communities</i> COLUMBUS GH Michael Griffin, Director, Multicultural Markets and Asset Management, Community Development Banking, Key Bank Robert Mooney, Deputy Director, Division of Consumer and Community Affairs, FDIC Amari Romero-Thomas, Senior Vice President, Community Impact, United Way Silicon Valley</p> <p><i>Cross-Sector Workforce Development and Advancement Collaboratives</i> COLUMBUS IJ Bob Giloth, Director, Family Economic Success, Annie E. Casey Foundation Marco Martinez, Coordinator, Energy Pathway Program, ConocoPhillips Marguerite Womack, Director, Economic/Workforce Development, United Way of Greater Los Angeles</p> <p><i>Advancing Financial Stability Through Public Policy</i> COLUMBUS KL Bill Crim, Vice President, Community Impact & Public Policy, United Way of Salt Lake Jennifer Brooks, Director, Policy CFED Steve Taylor, Vice President, Public Policy, United Way of America</p>
<p>Evening</p>	<p>6:00–7:30 pm Host City Event – Millennium Park</p>



Friday, June 6 th	
Morning	<p>8:00--8:30 am Continental Breakfast</p> <p>8:30--9:30 am Opening General Session <i>Keynote Speaker</i> Senator Bill Bradley Author, <i>The New American Story</i></p> <p>9:30--10:45 am Leader to Leader: Critical Conversations and Commitments</p> <p>10:30--10:45 am Break</p> <p>10:45--12:00 pm Best, Promising and Emerging Strategies <i>The Assets for Independence Program and IDAs</i> COLUMBUS AB Jim Gatz, Manager, AFI Program, Federal Office of Community Services Cassandra Kaufman, Director, Community Investment Division, United Way of Greater St. Louis Chuck Shannon, Vice President, Mile High United Way</p> <p><i>Technology Integration: Coalition Building, Readiness and Implementation</i> COLUMBUS CD Mary Shaheen, Vice President, United Way of New York State Norah Lovato, Manager, Technology & Field Engagement, United Way of America Diane McCants, Director, Community Impact United Way of Metropolitan Atlanta</p> <p><i>Strategies for Tax-Time Savings</i> COLUMBUS EF Dan Duncan, Senior Vice President, External Relations, United Way of Tucson & Southern Arizona Tim Flacke, Director of Business Development, D2D Fund, Inc. Rachel Freeze, Manager, Nashville Wealth Building Alliance, United Way of Metropolitan Nashville Barry Matthews, Corporate Vice President for Community Relations and Business Development, First State Bank</p> <p><i>Financial Education: Aligned for Success</i> COLUMBUS GH Emily Waterbury, Asset Services Director, San Francisco EARN Jonathan Mintz, Commissioner, New York City Department of Consumer Affairs Carl Zapora, President and CEO, United Way of Snohomish County</p> <p><i>Banking the Unbanked: The Bank on Cities Campaign</i> COLUMBUS IJ Honorable Jose Cisneros, Treasurer, City and County of San Francisco Heidi Goldberg, Senior Program Associate, Family Economic Success, National League of Cities Elwood Hopkins, Managing Director, Emerging Markets, Inc.</p> <p><i>Beyond Funding: Leveraging Corporate and Public Sector Partnerships</i> COLUMBUS KL Dennis Campa, Director, Department of Community Initiatives, City of San Antonio Wynne Lum, Sr Vice President, Regional Program Officer, Global Community Impact, Bank of America Frances Melson, Vice President, Investor Relations, United Way of America Angel Ysaguirre, Director, of Global Community Investing The Boeing Company</p>
Afternoon	<p>12:15--1:30 pm Luncheon General Session Luncheon Speaker Josephine Robinson Director, Federal Office of Community Services, Administration for Children and Families U.S. Department of Health and Human Services</p>