



**PROJECT  
REACH**

JULY 12, 2022

**FINANCIAL INCLUSION SYMPOSIUM**

Roundtable for  
Economic Access  
and Change

# AGENDA

**12:30 – 1:00 p.m.**

## Registration Check-In

**1:00 – 1:30 p.m.**

## Fireside Chat

*Michael Hsu, Acting Comptroller of the Currency*

*Sandra Thompson, Director of the Federal Housing Finance Agency*



**1:35 – 2:40 p.m.**

## Creating Paths to Affordable Homeownership

*Moderator:*

*Barry Wides, Deputy Comptroller for Community Affairs,  
Office of the Comptroller of the Currency*

*Lautaro “Lot” Diaz, Vice President,  
Housing & Financial Empowerment, UnidosUS*

*Kristy Fercho, Executive Vice President,  
Head of Wells Fargo Home Lending, Wells Fargo Bank*

*Jason Fraley, Senior Vice President,  
Community Lending Director, Huntington National Bank*

*Erik Schmitt, Managing Director, Home Lending Product and  
Innovation Executive, JPMorgan Chase*

*Tony Walters, Executive Director,  
National American Indian Housing Council*

*Neil Whitegull, Executive Director,  
Housing and Community Development Agency, Ho-Chunk Nation*



**2:40 – 2:50 p.m.**

## Break



2:50 – 3:50 p.m.

## Building Opportunities for Entrepreneurship and Small Businesses

*Moderator:*

**Andrew Moss**, Director for External Outreach and Minority Affairs, National Director for Project REACH, Office of the Comptroller of the Currency

**Ramit Arora**, President and Co-Founder, Biz2Credit

**Marisa Calderon**, Chief of Community Finance and Mobility, National Community Reinvestment Coalition

**Mary Miklethun**, Senior Vice President of Business Banking Segmentation and Analytics, U.S. Bank

**Jevaughn Sterling**, Executive Vice President, Regional Commercial Banking Manager, Amegy Bank

**Randi Zeller**, Director of Small Business Services, Mobility Capital Finance (MoCaFi)



3:55 – 5:00 p.m.

## Emerging Approaches for Inclusion of Credit Invisibles

*Moderator:*

**Grovetta Gardineer**, Senior Deputy Comptroller for Bank Supervision Policy, Office of the Comptroller of the Currency

**Mark Brucker**, Chief Risk Officer for Consumer and Community Banking, JPMorgan Chase

**John Hope Bryant**, Founder, Chairman, and Chief Executive Officer, Operation HOPE

**Rich Franks**, Head of Lightbox, Credit Karma

**Melissa Koide**, Chief Executive Officer, FinRegLab

**John Pitts**, Global Head of Policy, Plaid



5:00 – 6:00 p.m.

## Networking Reception

**PROJECT REACH** *the Roundtable for Economic Access and Change*, promotes financial inclusion through greater access to credit and capital. Project REACH convenes leaders from the banking industry, national civil rights and community organizations, business, and technology to identify and reduce barriers that prevent full, equal, and fair participation in the nation's economy.