



# 2021 AMBA *Virtual* FALL WORKSHOP

*Military Banking – Focus on the Future*

MONDAY, AUGUST 23 – TUESDAY, AUGUST 24, 2021

**MONDAY, AUGUST 23, 2021**

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

- 10:00 – 10:10 AM**      **Welcome and Opening Remarks: VADM (Ret.) John Bird, AMBA Chairman, and Maj Gen (Ret.) Steven. J. Lepper, AMBA President & CEO**
- 10:10 – 10:55 AM**      **Financial Regulator Perspectives**  
Moderator – **Ms. Diana Banks**, Vice President and Senior Counsel, American Bankers Association  
**Ms. Grovetta Gardineer**, Deputy Comptroller for Compliance Risk Policy, Office of the Comptroller of the Currency  
**Ms. Doreen R. Eberley**, Director, FDIC Division of Risk Management, Federal Deposit Insurance Corporation
- 10:55 – 11:25 AM**      **Legislative Perspective**  
**Col (Ret.) Dan Merry**, Vice President, Government Relations, Military Officers Association of America (MOAA)  
**Ms. Jennifer Davis**, Deputy Director, Government Relations, National Military Family Association (NMFA)
- 11:25 – 11:45 AM**      **Military Family Financial Readiness Coalition Update**  
**Ms. Shannon Razzadin**, Executive Director, Military Family Advisory Network (MFAN)
- 11:45 – 12:00 PM**      **Military Saves Month Update**  
**Ms. Angela Caban**, Director, Military Saves, Consumer Federation of America

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

- 2:00 – 2:45 PM**      **Veterans Benefits Banking Program (VBBP) Update**  
Moderator – **Maj Gen (Ret.) Steven. J. Lepper**, AMBA President & CEO  
**Ms. Shannon Razzadin**, President & Executive Director, Military Family Advisory Network (MFAN)  
**Ms. Rebecca Wiggins**, Executive Director, Association for Financial Counseling and Planning Education (AFCPE)  
**Mr. Bruce McClary**, Senior Vice President, Communications, National Foundation for Credit Counseling (NFCC)  
**Ms. Christine Bensedira**, Director, VBA Finance Center, Veterans Benefits Administration  
**Ms. Andia Dinesen**, Executive Vice President, AMBA
- 2:45 – 3:05 PM**      **DoD Financial Readiness Update**  
**Mr. Andrew Cohen**, Director, Financial Readiness, Office of the Under Secretary of Defense (Personnel and Readiness)
- 3:05 – 3:50 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 the Navy  
**Mr. David Fuqua**, United States Marine Corps  
**Mr. Robert Burke**, Department of the Air Force  
**MAJ Jennifer Evans**, Department of the Army
- 3:50 – 4:00 PM**      **Day one wrap-up: Maj Gen (Ret.) Steven J. Lepper, President & CEO, AMBA**

# Monday Special Sessions – by invitation only

4:00 PM

AMBA General Membership Meeting

4:00 PM

Bank Liaison Officer Training

**TUESDAY, AUGUST 24, 2021**

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

10:00 – 10:10 AM

**Day Two Welcome Remarks: Mr. Steven J. Lepper, President & CEO, AMBA**

10:10 – 12:00 AM

### Lessons Learned from COVID

#### **Consumer Fraud**

**Mr. Jim Rice**, Assistant Director, Office of Servicemember Affairs, Consumer Financial Protection Bureau

#### **COVID Military and Veteran Family Research**

**Mr. Bruce McClary**, Senior Vice President, Communications, National Foundation for Credit Counseling (NFCC)

**Dr. Crystal Lewis**, Director of Research & Insights, National Military Family Association (NMFA)

**Dr. Shelley Kimball**, Director of Research, Military Family Advisory Network (MFAN)

#### **Bank perspective**

**Mr. Tom McLean**, Regional Military Executive, Armed Forces Bank

**Mr. Paul Benda**, Senior Vice President, Operational Risk & Cybersecurity, American Bankers Association

**Mr. Chris Cole**, Executive Vice President and Senior Regulatory Counsel, Independent Community Bankers of America

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

2:00 – 2:30 PM

**Presentation of Military Departments' 2020 Distinguished Bank Service Awards** – Presented by the Military Services

2:30 – 3:00 PM

### Is the Future of Payments the Future of Banking?

**Mr. John Broda**, President & CEO, Armed Forces Financial Network

**Mr. Jeff Riesenberger**, Vice President of Member Engagement, Armed Forces Financial Network

3:00 – 3:30 PM

### Military Retirement & Transition

#### **Armed Forces Bank**

**Mr. Tom McLean**, Regional Military Executive

**Ms. Jodie Pitsenbarger**, Manager of Branch Operations

#### **Regions Bank**

**Mr. Steve Beres**, Vice President, Service Members and Veterans Outreach Manager

**Ms. Kimberly Robichaud**, Diversity, Equity & Inclusion Program Manager

3:30 – 3:45 PM

### Military Saves Designation of Savings Excellence – Award Presentation

**Ms. Angela Caban**, Director, Military Saves, Consumer Federation of America

3:45 – 4:00 PM

### **AMBA Workshop Action Items/Closing Remarks:**

**VADM (Ret.) John Bird**, Chairman, AMBA and **Maj Gen (Ret.) Steven J. Lepper**, President & CEO, AMBA

## Special Session

### Why We Serve

**Maj Gen (Ret.) Andrew “Andy” Egeland**