



2023 AMBA FALL WORKSHOP

AUGUST 20 - 23, 2023 ▪ RITZ-CARLTON ▪ PHILADELPHIA, PA
THE TRANSFORMATION OF MILITARY BANKING

SUNDAY, AUGUST 20, 2023

5:00 PM	7:00 PM	Workshop Registration – <i>Grand Ballroom Prefunction</i>
7:00 PM	9:00 PM	Welcome Networking Reception – <i>The Exchange</i>

MONDAY, AUGUST 21, 2023 – Military Banking Day

7:00 AM	4:00 PM	Workshop Registration – <i>Grand Ballroom</i>
7:00 AM	8:00 AM	Continental Breakfast and Networking – <i>Grand Ballroom Prefunction</i>
8:00 AM	4:00 PM	Workshop Program – <i>Grand Ballroom</i>
8:00 AM	8:15 AM	National Anthem Opening Remarks: VADM (Ret.) John Bird, AMBA Chairman and Maj Gen (Ret.) Steven J. Lepper, AMBA President & CEO
8:15 AM	9:00 AM	Financial Regulator Panel Discussion Moderator – Mr. Sasha Leonhardt , Partner, FinTech, Strategic Advisory & Government Enforcement, Orrick Law Firm 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
9:00 AM	9:45 AM	The Banking Industry Perspective Mr. Sam Mayer , Vice President, Congressional Relations, Independent Community Bankers of America Mr. Blake Earley , VP, Congressional Relations, American Bankers Association Mr. Michael League , President & CEO, 5Star Bank
9:45 AM	10:15 AM	Break and Networking – <i>Grand Ballroom Prefunction</i>
10:15 AM	10:45 AM	A Survey of Banking Laws and Regulations Mr. Sasha Leonhardt , Partner, FinTech, Strategic Advisory & Government Enforcement, Orrick Law Firm
10:45 AM	11:30 AM	Evolution of Military Banking Ms. Jill Castilla , President and CEO, Citizens Bank of Edmond - <i>invited</i> Mr. John Baeuchle , EVP, Director of Military Banking, Armed Forces Bank Mr. Joe Gurney , SVP, Government Solutions, MOCA
11:30 AM	1:00 PM	AMBA Workshop Luncheon: Presentation of 2023 Military Saves Designation of Excellence – <i>Petite Ballroom</i> Presented by Ms. Kia McCallister-Young , Director, America Saves
1:00 PM	2:15 PM	DoD Military Banking Program Panel Discussion – Mr. Bill E. Hawbecker , Director, DoD Banking and Credit Union Office, Defense Finance and Accounting Service Mr. Bryan Smith , Department of Navy - <i>invited</i> Mr. David Fuqua , Marine Corps Mr. Eric Cuebas , Department of Air Force - <i>invited</i> CPT Terrell Murdock , Department of Army - <i>invited</i>
2:15 PM	2:45 PM	Break and Networking – <i>Grand Ballroom Prefunction</i>
2:45 PM	3:45 PM	Military Family Financial Readiness Ms. Shannon Razsadin , President and Executive Director, Military Family Advisory Network Ms. Besa Pinchotti , Executive Director & CEO, National Military Family Association Mr. Andrew Cohen , Director, Financial Readiness, Office of the Under Secretary of Defense (Personnel and Readiness)
3:45 PM	4:00 PM	Day One Wrap-Up , Maj Gen (Ret.) Steven J. Lepper, AMBA President & CEO, AMBA
4:00 PM	5:00 PM	Bank Liaison Officer Training Breakout Session – <i>location</i>
4:00 PM	5:00 PM	AMBA General Membership Meeting (AMBA Regular Corporate Members)
5:00 PM	6:30 PM	Break
6:30 PM	7:00 PM	Networking Reception – <i>Grand Ballroom Prefunction</i>
7:00 PM	10:00 PM	Banquet Dinner – <i>Grand Ballroom</i>

TUESDAY, AUGUST 22, 2023 – Veteran Banking Day

7:00 AM	4:00 PM	Workshop Registration – <i>Grand Ballroom</i>
7:00 AM	8:00 AM	Continental Breakfast and Networking – <i>Grand Ballroom Prefunction</i>
8:00 AM	4:30 PM	Workshop Program – <i>Grand Ballroom</i>
8:00 AM	8:15 AM	General Session Welcome Remarks: Maj Gen (Ret.) Steven J. Lepper, AMBA President & CEO
8:15 AM	8:45 AM	Military & Veteran Family Financial Research Dr. Gabby L’Esperance , Director of Research and Program Evaluation, Military Family Advisory Network
8:45 AM	9:15 AM	A Survey of Veteran Financial Issues Ms. Bonnie Wallace , Head of Financial Wealth Philanthropy, Wells Fargo Foundation
9:15 AM	10:15 AM	Veterans Benefits Banking Program Panel Ms. Rachael Deleon , Acting Executive Director, The Association for Financial Counseling and Planning Education - (AFCPE) Ms. Jennifer Pizi , Chief Operating Officer, National Foundation for Credit Counseling Ms. Christine Bensedira , Director, Veterans Benefits Administration (VBA) Finance Center Mr. Fred Alvarado , Vice President and Wealth Advisor, Bank of Hawaii
10:15 AM	10:30 AM	Break and Networking – <i>Grand Ballroom Prefunction</i>
10:30 AM	11:15 AM	Veteran Mental – Physical – Financial Health Connections Mr. Chet Bennetts , Assistant Professor, Financial Planning, The American College
11:15 AM	12:00 PM	Why We Serve <i>TBD</i>
12:00 PM	1:30 PM	AMBA Workshop Luncheon and Military Departments’ 2022 Distinguished Bank Service Awards Presentation – <i>Petite Ballroom</i>
1:30 PM	2:30 PM	Veterans Support and Benefits Ms. Lila Quintiliani , Program Director, Financial and Benefits Education/Counseling, Military Officers Association of America Mr. Tom Kastner , Financial Wellness Vice President, Wounded Warrior Project Mr. JJ Montanaro , Relationship Director, Military Advocacy Group, USAA
2:30 PM	3:00 PM	Break and Networking – <i>Grand Ballroom Prefunction</i>
3:00 PM	3:30 PM	Bringing it all Together – Banking for Military and Veteran Families COL Jerry Quinn (USAR), Chief Operating Officer and Secretary, AAFMAA
3:30 PM	4:30 PM	AMBA Workshop Action Items/Closing Remarks: Michael League, AMBA Chairman and Maj Gen (Ret.) Steven J. Lepper, AMBA President & CEO
4:30 PM	6:30 PM	Break
6:30 PM	8:30 PM	Farewell Networking Reception – <i>The Exchange</i>

WEDNESDAY, AUGUST 23, 2023

All Day		<i>Check-out and Departure</i>
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