



2024 AMBA FALL WORKSHOP

AUGUST 25 - 28, 2024 ▪ LOTTE HOTEL ▪ SEATTLE, WA
CELEBRATING 65 YEARS!

SUNDAY, AUGUST 25, 2024

4:00 PM	6:00 PM	Workshop Registration – <i>Charlotte Restaurant</i>
6:00 PM	8:00 PM	Welcome Networking Reception – <i>Charlotte Restaurant</i>

MONDAY, AUGUST 26, 2024 – Setting the Stage

7:00 AM	4:00 PM	Workshop Registration – <i>Sanctuary Grand Ballroom</i>
7:00 AM	8:00 AM	Continental Breakfast and Networking – <i>Sanctuary Grand Ballroom</i>
8:00 AM	4:00 PM	Workshop Program – <i>Sanctuary Grand Ballroom</i>
8:00 AM	8:15 AM	National Anthem Invocation , Mr. Lindsey Streeter, AMBA Director Opening Remarks : Mr. Michael League, AMBA Chair and Maj Gen (Ret.) Steven J. Lepper, AMBA President & CEO
8:15 AM	9:00 AM	Risk, Fraud, Regulation, and the Military Community Moderator - Maj Gen (Ret.) Steven J. Lepper , AMBA President & CEO 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	Military Community Risk, Fraud Protection, and Response Moderator - Ms. Andia Dinesen , EVP Communications and Operations, AMBA Mr. Jim Rice , Assistant Director, Office of Servicemember Affairs, Consumer Financial Protection Bureau (CFPB) Ms. Mel Lanning Trumpower , Executive Director, BBB Institute for Marketplace Trust
9:45 AM	10:15 AM	Break and Networking – <i>Sanctuary Grand Ballroom</i>
10:15 AM	11:00 AM	Advocacy: Law, Regulation, Good Intentions and Unintended Consequences Moderator - Maj Gen (Ret.) Steven J. Lepper , AMBA President & CEO Mr. Scott Marks , Assistant Vice President of Congressional Relations, Independent Community Bankers of America Mr. Blake Earley , VP, Congressional Relations, American Bankers Association
11:00 AM	12:00 PM	What is the Research Showing Us in the Military and Veteran Communities? Moderator - Ms. Andia Dinesen , EVP Communications and Operations, AMBA Ms. Shannon Rzasadin , CEO, Military Family Advisory Network – MFAN’s Military Support Programming Survey Report & WWP Caregiver & Family Wellbeing Report Ms. Julie Soares , Associate Director of Financial Readiness, Wounded Warrior Project - Warrior Financial Well-being Mr. Bruce McClary , Senior Vice President of Communications at the National Foundation for Credit Counseling (NFCC) - Consumer Financial Literacy and Preparedness Survey
12:00 PM	1:30 PM	AMBA Workshop Luncheon and Military Departments’ 2023 Distinguished Bank Service Awards Presentation – <i>Gallery Ballroom</i>
1:30 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 Mr. Michael Windsor , Department of Air Force MAJ Terrell Murdock , Department of Army
2:15 PM	2:45 PM	Break and Networking – <i>Sanctuary Grand Ballroom</i>
2:45 PM	3:45 PM	Addressing the Needs of the Veteran Community Moderator – Ms. Bonnie Wallace , Senior Vice President, Head of Financial Health, Wells Fargo Foundation Mr. Patrick Phillips , Accountant, Systems & Innovation Division, VBA Finance Center Ms. Andia Dinesen , EVP Communications and Operations, AMBA Ms. Rachael Deleon , Executive Director, Association for Financial Counseling and Planning Education® (AFCPE®) Mr. Blake Allison , Founder, CEO & President, LifeCents
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>Meeting Room 5D</i>
4:00 PM	5:00 PM	AMBA General Membership Meeting (AMBA Regular Corporate Members) – <i>Sanctuary Grand Ballroom</i>
5:00 PM	6:00 PM	Break
6:00 PM	7:00 PM	Networking Reception – <i>Halo Bar</i>
7:00 PM	10:00 PM	AMBA’s 65th Anniversary and Steve’s Farewell Banquet Dinner – <i>Sanctuary Grand Ballroom</i>

TUESDAY, AUGUST 27, 2024 – Workshop Day

7:00 AM	4:00 PM	Workshop Registration – <i>Sanctuary Grand Ballroom</i>
7:00 AM	8:30 AM	Continental Breakfast and Networking – <i>Sanctuary Grand Ballroom</i>
8:00 AM	4:30 PM	Workshop Program – <i>Sanctuary Grand Ballroom</i>
8:15 AM	8:30 AM	Opening Remarks: BG (Ret.) Omuso George, AMBA, Chief Operating Officer
8:30 AM	9:15 AM	Financial Readiness Trends & Benefits for Military and Veteran Families Moderator - Ms. Andia Dinesen , EVP Communications and Operations, AMBA Ms. Lila Quintiliani , Program Director, Financial and Benefits Education/Counseling, Military Officers Association of America (MOAA) Mr. Joseph Montanaro , Relationship Director, Military Advocacy Group, USAA
9:15 AM	10:00 AM	Fintech – The Necessary Partner to Help Embrace Innovation Mr. Phil Goldfeder , CEO, American Fintech Council
10:00 AM	10:30 AM	Break and Networking – <i>Sanctuary Grand Ballroom</i>
10:30 AM	11:30 AM	Why We Serve Maj Gen (Ret.) Steven J. Lepper, AMBA President & CEO
11:30 AM	12:00 PM	Case Study: Steve Lepper and Workshop Day Structure and Goals: Andia Dinesen
12:00 PM	1:30 PM	AMBA Workshop Luncheon: Charitable Giving & AMBA Matching Grant Recognition Luncheon – <i>Gallery Ballroom</i>
1:30 AM	2:10 PM	Tabletop Discussion Session 1 (Financial Topic Brainstorm)
2:10 PM	2:30 PM	Facilitators report out
2:30 PM	2:45 PM	Break and Networking – <i>Sanctuary Grand Ballroom</i>
2:45 PM	3:25 PM	Tabletop Discussion Session 2 (How to Move the Needle)
3:25 PM	3:45 PM	Facilitators report out
3:45 PM	4:00 PM	Table discussion wrap up: Andia Dinesen
4:00 PM	4:30 PM	AMBA Workshop Action Items/Closing Remarks: Mr. Michael League, AMBA Chair and BG (Ret.) Omuso George, COO (AMBA President & CEO as of 1 September)
4:30 PM	6:00 PM	Break
6:00 PM	8:00 PM	Farewell Networking Reception – <i>Halo Bar</i>

WEDNESDAY, AUGUST 28, 2024

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