

PARTNERSHIP
for FINANCIAL
EQUITY

Financial Equity Summit 2024

Tuesday, October 1 from 9am-12pm on Zoom

Wednesday, October 2 from 10am-2pm at Redemption Rock Brewery in Worcester

Community Reinvestment Act Innovators

October 1, 2024

Agenda for Zoom

- 9:00am-9:10am Welcome to our 3rd annual Summit
- 9:10am- 9:30am Opening Speaker - **Moddie Turay**, Massachusetts Housing Investment Corporation
- 9:30am-10:30am Panel 1: *CRA in 2024* - How CRA can be used to increase equity in our communities despite all the uncertainty. **Tom Golden**, Rockland Trust; **Delisa Joseph**, Needham Bank; **Alison Tower**, Hometown Financial Group; **Susan Murray**, SEED, Inc.
- 10:45am-12:00pm Panel 2: CRA innovation around the country: **Horacio Mendez**, Woodstock Institute (IL); **Paulina Gonzalez-Brito**, Rise Economy (CA); **Betty Francisco**, BII; **Sarah Dieleman Perry**, Neighborhood Allies (PA)

Celebrating Responsive Banking Services and Taking on Future Challenges

October 2, 2024

Agenda for Redemption Rock Brewing in Worcester

- 10:00am-10:15am Arrival, coffee, tea and light refreshments
- 10:15am-10:45am Successes and challenges in New England's second largest city
Seth Pitts, CEO of Bay State Savings Bank; **Yvette Dyson**, Exec Director, Worcester Common Ground
- 10:45am-11:45am Roundtable discussion on 30 years of Basic Banking for Massachusetts and what still needs to be done to reach unbanked households:
Tom Curry, former Comptroller of the Currency; **Joe Feaster**, Counsel at Dain, Torpy and former MCBC President; **Jason Andrade**, Compass Working Capital; **Lena Buteau**, Monson Savings
- 11:45pm-12:00pm Announcement of **Elevating Equity Awards** for banking services, small business, and mortgage lending
- 12:00pm-12:30pm OCC Deputy Comptroller **Donna Murphy** keynote speech introduced by former Comptroller **Tom Curry** followed by Q&A
- 12:30pm-1:30pm Conversation on closing wealth gaps with **Sabrina Correia**, **Darrell Byers** and **Symone Crawford** moderated by **Brook Ames**
- 1:30pm-1:45pm **MA Lieutenant Governor Kim Driscoll**
- 1:45pm-2:30pm Lunch from **Jollof Masters**, 30th birthday cake from **Sweet Teez Bakery**, networking, drinks including the debut of our signature mocktail/cocktail **Equity Elixir**