



Southwest Regional Conference on Reaching Unbanked People
Monday, December 4, 2006 9:30 a.m. – 4:30 p.m.
Edinburg, Texas

Theme: Unbanked at the Border and Serving Immigrant Unbanked

- 9:30 a.m. **Welcome and Event Overview**
- Bret Mann, Director, Center Office of Center Operations and Community Services, University of Texas – Pan American
 - Dan Iannicola, Jr., Deputy Assistant Secretary for Financial Education, US Department of the Treasury
 - Anna Escobedo Cabral, Treasurer of the United States
 - JoAnn Johnson, Chairman, National Credit Union Administration
- 9:50 a.m. **Community Perspective**
Michael Goeken, Department of Community Initiatives, City of San Antonio, Texas
- 10:00 a.m. **Financial Needs and Financial Status of Border Families**
Bárbara Robles, Associate Professor, Arizona State University
- 10:25 a.m. Break
- 10:40 a.m. **Financial Institution Panel** Moderator: David Lewis, District Community Affairs Officer
Office of the Comptroller of the Currency
- Douglas Bready, McAllen Region President, Texas State Bank
 - David Guerra, President and Chief Executive Officer, International Bank of Commerce
 - Maria Martinez, President and Chief Executive Officer, Border Federal Credit Union
 - Harriet May, President and Chief Executive Officer, GECU
- 12:00 p.m. Networking lunch
- 1:10 p.m. **Resource Panel** Moderator: Eloy Villafranca, Community Affairs Officer, FDIC
- Matthew Davies, FedACH Sales Specialist Federal Reserve Bank of Dallas
 - Nancy Granovsky, Professor and Extension Family Economics Specialist, Texas Cooperative Extension
 - David Hirschman, Stakeholder Partnerships, Education and Communication Austin Territory Manager, Internal Revenue Service
- 2:10 p.m. **Roundtable Discussions**
- Remittances and Reaching the Unbanked
 - Innovative Products and Strategies for Reaching the Unbanked
 - Asset Building and Reaching the Unbanked
 - Financial Education and Reaching the Unbanked
- 3:20 p.m. Break
- 3:35 p.m. Report Back and Moderated Discussion
- 4:15 p.m. Wrap-Up & Next Steps