

Northwest Regional Conference

on

Reaching Unbanked People

**Working Together to
Move People Ahead**



**March 27, 2007
9:00 a.m. to 4:30 p.m.
Seattle, Washington**

Working Together to Move People Ahead

As part of *Taking Ownership of the Future: The National Strategy for Financial Literacy (National Strategy)*, the U.S. Department of the Treasury, the Federal Deposit Insurance Corporation, the National Credit Union Administration, the Office of the Comptroller of the Currency, the Office of Thrift Supervision and the Federal Reserve Bank of San Francisco – with the help of the U.S. Department of Housing and Urban Development and the Washington State Department of Financial Institutions, invite you to join them for the Northwest Regional Conference on Reaching Unbanked People.

Banks and credit unions across the Northwest are exploring ways to reach a new market – unbanked customers. Serving people outside of the financial mainstream takes creative thinking, and often involves partnerships between financial institutions and community organizations that have the access to and the trust of such individuals. At this meeting, you will hear from some of the most innovative financial institutions and other organizations working to reach underserved consumers in the Northwest. The conference will also provide a forum to share observations and ideas with the convening agencies and other practitioners.

The *National Strategy* specifically recognizes the importance of private industry in developing innovative, market-based solutions for providing financial services and financial education to underserved populations. The Northwest Regional Conference is being held to publicize and build on these practices, and is the third of a series of conferences that will be held nationwide. Proceedings of the conferences will be compiled to provide a report on current and best practices for serving unbanked individuals.

Agenda Highlights

Featured Speakers

will include

- Anna Escobedo Cabral, Treasurer of the United States
- Rodney E. Hood, Vice Chairman, National Credit Union Administration
- John F. Carter, Regional Director, Federal Deposit Insurance Corporation
- Kerry Killinger, Chairman and Chief Executive Officer, Washington Mutual, Inc.
- Dan Iannicola, Jr., Deputy Assistant Secretary, US Department of the Treasury
- Anne Stuhldreher, Fellow, New America Foundation

Regional and Local Perspectives Panel

panelists will include

- Janet Byrd, The Neighborhood Partnership Fund
- Loretta Moesta, OUR Credit Union
- Dave Sieminski, United Way of King County

Moderator: Craig Nolte,

Federal Reserve Bank of San Francisco

Effective Models and Practices

panelists will include

- Tom Berquist, BECU
- Claudia Lopez, Cashmere Valley Bank
- Tricia McKay, Medina Foundation
- Gabe Mello, Juma Ventures

Moderator: Louisa Quittman,

US Department of the Treasury

Networking Lunch

Roundtable Discussions

Topics may include:

- Designing a comprehensive model to reach the unbanked
- Next steps to reaching unbanked immigrants
- Innovations in reaching unbanked people
- Reaching unbanked youth and young adults

Why You Should Attend

- Learn about proven and innovative practices from financial institutions, community organizations, and resources in the Northwest.
- Share your ideas, challenges, and questions with practitioners and regulators.
- Network and build partnerships with financial institutions, community organizations, and government agencies.
- Provide feedback to policy makers about issues facing the field.

Sponsors



Registration Information

The Conference will be held at the **Grand Hyatt Seattle located at 721 Pine Street in downtown Seattle.**

The Conference is free, but advance registration is required as space is limited.

Register on-line at

<http://www.frbsf.org/community/resources/events.html> or

<https://www.kansascityfed.org/sanfran/flec/> or

Fax or Mail this form to:

Lauren Mercado Brioses
Community Development
Federal Reserve Bank of San Francisco
101 Market Street, Mailstop 620
San Francisco, CA 94105

Fax: (415) 393-1920

Attention: Northwest Regional Conference
on Reaching Unbanked People

Registrant's Name: _____

Title: _____

Organization: _____

Mailing Address: _____

Phone Number: _____

E-mail Address: _____

Registrations must be received not later than March 22.

For questions about the conference, email: FLECSTRATEGY@do.treas.gov or call Louisa Quittman at (202) 622-8103 or Craig Nolte at (206) 343-3761.

For a map and directions to the conference, visit: <http://grandseattle.hyatt.com>.

The Financial Literacy and Education Commission

The Financial Literacy and Education Commission (Commission) was established under Title V of the Fair and Accurate Credit Transactions (FACT) Act of 2003 to improve financial literacy and education of persons in the United States. The Commission is chaired by the Secretary of the Treasury and composed of 19 other Federal agencies.

The principal duties of the Commission include encouraging government and private sector efforts to promote financial literacy; coordinating financial education efforts of the Federal government; identification and promotion of best practices; development of a national strategy to promote financial literacy; establishment of a website to serve as a clearinghouse and provide information about financial education programs and grants; and establishment of a toll-free hotline available to provide information about issues of financial literacy and education.

Taking Ownership of the Future

On April 4, 2006, the Commission released *Taking Ownership of the Future: The National Strategy for Financial Literacy (National Strategy)*. Beyond meeting a statutory requirement, there are three major purposes to the *National Strategy*. First, it is designed to identify issues within the field of financial education. This will assist policymakers and practitioners alike as they assess the national level of financial literacy. Second, the *National Strategy* proposes solutions — in some cases by suggesting specific steps and in other cases by offering examples of programs with features that should be replicated. Third, the *National Strategy* seeks to advance the conversation on financial education. The *National Strategy* is designed to serve as an action plan, and, in time, a rallying point for those advocating for greater financial literacy in America.