

ACCELERATE FINANCIAL INCLUSION in your COMMUNITY

Agenda

DAY ONE:

Implementing an ITIN Lending Program

- 8:15a-9a: Breakfast and Registration
- 9a-9:15a: Introductions
- 9:15a-10a: The Opportunity for Financial Inclusion
- 10a-11a: Generating Organizational Buy-In to Practice Diversity and Inclusion
- 11a-12p: Risk, Regulation, and Compliance for ITIN Lending
- 12p-1p: Lunch
- 1p-1:30p: Risk, Regulation, and Compliance for ITIN Lending (continued)
- 1:30p-2:30p: Operational Considerations for ITIN Lending
- 2:30p-4:00p: Connecting with Your Community
- 4:00p-5p: Closing Panel / Q&A

- 5:30p-6:30p: Networking Happy Hour

DAY TWO:

Implementing a Small Business Lending Referral Partnership

- 8:15a-9a: Breakfast and Registration
- 9a-9:15a: Introductory Remarks
- 9:15a-9:45a: The Business Case for Small Business Lending
- 9:45-10:45a: Referral Partner Overview: Accion and Grameen America
- 10:45-11:15a: Implementing the Referral Process
- 11:15-12:00p: Putting Everything Into Action: Next Steps for Participants