

# ACCELERATE FINANCIAL INCLUSION in your COMMUNITY

## Agenda

### DAY ONE:

#### Implementing an ITIN Lending Program

- 8:00a-8:30a: Breakfast and Registration
  - 8:30a-9:00a: Introductions
  - 9:00a-9:45a: The Opportunity for Financial Inclusion
  - 9:45a-10:00a: Break
  - 10:00a-11:00a: Generating Organizational Buy-In to Practice Diversity & Inclusion
  - 11:00a-12:00p: Risk, Regulation, and Compliance for ITIN Lending (Part 1)
  - 12:00p-12:30p: Lunch
  - 12:30p-1:00p: Complete Risk, Regulation.... (Part 2/Working Lunch)
  - 1:00p-1:15p: Break
  - 1:15p-2:30p: Operational Considerations for ITIN Lending – Experienced CU Panel
  - 2:30p-2:45p: Break
  - 2:45p-4:00p: Connecting with Your Community
  - 4:00p-4:30p: Putting it All Together: Juntos Application as a Tool and Action Plan
  - 4:30p-5:00p: Closing Q&A
- 5:15p-6:45p: Networking Happy Hour

---

### DAY TWO:

#### Implementing a Small Business Lending Referral Partnership

- 8:00a-8:30a: Breakfast and Registration
- 8:30a-9:00a: The Business Case for Small Business Lending
- 9:00a-10:30p: Referral Partner Overview: Accion and Grameen America
- 10:30a-10:45a: Break
- 10:45a-11:30a: Small Business Referral Process
- 11:30a-12:00p: Putting Everything Into Action- Next Steps for Participants

BROUGHT TO YOU BY

COOPERA<sup>®</sup> / **inclusiv.** / PolicyWorks<sup>®</sup> Filene<sup>\*</sup>

**ACCION**  GRAMEEN AMERICA

THROUGH GENEROUS FINANCIAL  
SUPPORT & GUIDANCE FROM

**VISA**