FINANCIAL INCLUSION FORUM

The Ronald Reagan Building & International Trade Center
1300 Pennsylvania Ave, NW | Washington DC
Thursday December 1, 2016

Evidence to Action

#2016FIF
GENERAL INFORMATION

Forum Hosts
U.S. Department of the Treasury
U.S. Agency for International Development

Quick Links
Forum Site: FIForum.us
Social Media Hub: bit.ly/2016FIF
Social Media Toolkit: bit.ly/2016FIFKit

Top Twitter Handles
@USTreasury
@USAID
@Lagarde
@GayleSmith
@GlobalDevLab
@USAID_Digital

#2016FIF
# Morning Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30 – 8:30 a.m.</td>
<td><strong>Morning Refreshments &amp; Welcome</strong></td>
<td>Pavilion Room</td>
</tr>
<tr>
<td>8:30 – 8:35 a.m.</td>
<td><strong>Call to Order</strong></td>
<td>Pavilion Room</td>
</tr>
<tr>
<td></td>
<td><strong>Amias Gerety</strong>, Acting Assistant Secretary for Financial Institutions, U.S. Department of the Treasury, @USTreasury</td>
<td></td>
</tr>
<tr>
<td>8:35 – 9:20 a.m.</td>
<td><strong>Armchair Conversation</strong></td>
<td>Pavilion Room</td>
</tr>
<tr>
<td></td>
<td>Moderated by <strong>Jacob Schlesinger</strong>, Wall Street Journal, @WSJ</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Jacob J. Lew</strong>, Secretary, U.S. Department of the Treasury, @USTreasury</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Gayle E. Smith</strong>, Administrator, U.S. Agency for International Development, @GayleSmith</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Christine Lagarde</strong>, Managing Director, International Monetary Fund, @Lagarde</td>
<td></td>
</tr>
<tr>
<td>9:20 – 9:40 a.m.</td>
<td><strong>Keynote I</strong></td>
<td>Pavilion Room</td>
</tr>
<tr>
<td></td>
<td><strong>Paul Romer</strong>, Chief Economist, World Bank, @WorldBank</td>
<td></td>
</tr>
<tr>
<td>9:40 – 10:40 a.m.</td>
<td><strong>Panel Discussion: Impact of Financial Inclusion</strong></td>
<td>Pavilion Room</td>
</tr>
<tr>
<td></td>
<td>Moderated by <strong>Jonathan Morduch</strong>, Professor of Public Policy and Economics, New York University, @JMorduch</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Martin Cihák</strong>, Advisor, International Monetary Fund, @IMF</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Michael Collins</strong>, Associate Professor, University of Wisconsin – Madison &amp; Faculty Director, Center for Financial Security, @jmcollinswisc</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Ellen Seidman</strong>, Senior Fellow, Urban Institute, @esseidman</td>
<td></td>
</tr>
<tr>
<td>10:40 – 11:10 a.m.</td>
<td><strong>Break</strong></td>
<td>Pavilion Room</td>
</tr>
<tr>
<td>11:10 – 11:30 a.m.</td>
<td><strong>Keynote II</strong></td>
<td>Pavilion Room</td>
</tr>
<tr>
<td></td>
<td><strong>Andrea Levere</strong>, President, Corporation for Enterprise Development (CFED), @cfed</td>
<td></td>
</tr>
</tbody>
</table>

#2016FIF
11:30 a.m. – 12:30 p.m.  **Panel Discussion: Responsive Regulation**  Pavilion Room

*Moderated by Melissa Koide, Deputy Assistant Secretary for Consumer Policy, U.S. Department of the Treasury, @USTreasury*

- Bryan Barnett, Banking Advisor, Office of Technical Assistance, U.S. Department of the Treasury, @USTreasury
- Amy Friend, Senior Deputy Comptroller and Chief Counsel, Office of the Comptroller of the Currency, @USOCC
- Timothy Lyman, Lead Adviser, Consultative Group to Assist the Poor, @CGAP
- Mark Pearce, Director, Division of Depositor and Consumer Protection, Federal Deposit Insurance Corporation, @FDICgov

12:30 – 1:00 p.m.  **Lunch**  Pavilion Room

1:00 – 1:25 p.m.  **Lunch Flash: Investing for Financial Inclusion**  Pavilion Room

- Gil Crawford, CEO, MicroVest
- Elizabeth Littlefield, CEO, Overseas Private Investment Corporation, @opicgov
- Andrée Simon, Co-CEO, FINCA Microfinance Holdings, @AndreeSimon

1:25 – 1:45 p.m.  **Keynote III**  Pavilion Room

- Carolina Trivelli, Senior Researcher, Instituto de Estudios Peruanos & former Minister of Development and Social Inclusion, Peru, @IEPeruanos

1:45 – 2:45 p.m.  **Panel Discussion: Policies for Financial Inclusion**  Pavilion Room

*Moderated by David Porteous, Bankable Frontiers Associates, @BFAGlobal*

- Annie Donovan, Director, Community Development Financial Institutions Fund, U.S. Department of the Treasury, @ADonovanCDFI
- Gloria Grandolini, Senior Director, Finance & Markets, World Bank, @WorldBank
- Ida Rademacher, Executive Director, Financial Security Program, Aspen Institute, @idarademacher
- Tianqui Sun, Deputy Director-General, Financial Consumer Protection Bureau, People’s Bank of China

2:45 – 2:50 p.m.  **Breakout Session Introduction and Logistics**  Pavilion Room

- Louisa Quittman, Director of Financial Security, U.S. Department of the Treasury, @USTreasury
# Late Afternoon Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>2:50 – 3:20 p.m.</td>
<td>Coffee Break</td>
<td>Pavilion Room</td>
</tr>
<tr>
<td>3:20 – 4:20 p.m.</td>
<td>Concurrent Break Out Sessions</td>
<td>Pavilion Room</td>
</tr>
<tr>
<td></td>
<td><strong>An Infrastructure, Systems Approach to Financial Inclusion</strong></td>
<td>Pavilion Room</td>
</tr>
<tr>
<td></td>
<td><em>Moderated by Kay McGowan, Director, Digital Finance, USAID, @GlobalDevLab</em></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Carol Benson, Founding Partner, Glenbrook Partners</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tilman Ehrbeck, Partner, Omidyar Network, @OmidyarNetwork</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sanjay Jain, iSPIRT Foundation, @snjyjn</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Kody Kinsley, Assistant Secretary for Management, U.S. Department of the Treasury, @USTreasury</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Kim Saunders, President and CEO, EADS Group</td>
<td></td>
</tr>
<tr>
<td>4:35 – 5:05 p.m.</td>
<td>Moving Forward from Evidence to Action</td>
<td>Pavilion Room</td>
</tr>
<tr>
<td></td>
<td><em>Moderated by Priya Jaisinghani, Director, Center for Digital Development, USAID, @USAID</em></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Alexia Latortue, Principal Deputy Assistant Secretary for International Development Policy, U.S. Department of the Treasury, @USTreasury</td>
<td></td>
</tr>
</tbody>
</table>
SPEAKER BIOS

**Jacob J. Lew**, *Secretary, U.S. Department of the Treasury*. Secretary Lew was confirmed by the United States Senate on February 27, 2013, to serve as the 76th Secretary of the Treasury. Secretary Lew previously served as White House Chief of Staff. Prior to that role, Lew was the Director of the Office of Management and Budget (OMB), a position he also held in President Clinton’s Cabinet from 1998 to 2001. Before returning to OMB in 2010, Lew first joined the Obama Administration as Deputy Secretary of State for Management and Resources. Before joining the State Department, Lew served as managing director and chief operating officer for two different Citigroup business units. Prior to that, he was executive vice president and chief operating officer of New York University, where he was responsible for budget, finance, and operations, and served as a professor of public administration. [@USTreasury](mailto:USTreasury@)

**Gayle E. Smith**, *Administrator, USAID*. Smith was sworn into office as the 17th Administrator of USAID on December 2, 2015. As a long-time leader in President Obama’s Administration, she has helped shape and guide America’s international development policy for the past seven years, including by elevating development as a vital component of the national security agenda. As Administrator of USAID, Smith oversees a dedicated team of nearly 10,000 professionals working to end extreme poverty, foster sustained and inclusive economic growth, and promote resilient, democratic societies all over the world. She is committed to sustaining USAID’s work to lift up the world’s most vulnerable people through promoting innovative partnerships, emphasizing science and technology, engaging with and strengthening local leadership, and maintaining a relentless focus on evaluating, measuring, and delivering results. [@GayleSmith](mailto:GayleSmith@)

**Christine Lagarde**, *Managing Director, IMF*. Christine Lagarde joined the French government in June 2005 as Minister for Foreign Trade. After a brief stint as Minister for Agriculture and Fisheries, in June 2007 she became the first woman to hold the post of Finance and Economy Minister of a G-7 country. From July to December 2008, she also chaired the ECOFIN Council, which brings together Economics and Finance Ministers of the European Union, and helped foster international policies related to financial supervision, regulation, and strengthening global economic governance. As Chairman of the G-20 when France took over its presidency for the year 2011, she set in motion a wide-ranging work agenda on the reform of the international monetary system. On July 5, 2011, Christine Lagarde became the eleventh Managing Director of the IMF, and the first woman to hold that position. On February 19, 2016, the IMF Executive Board selected her to serve as IMF Managing Director for a second five-year term starting on July 5, 2016. [@Lagarde](mailto:Lagarde@)

#2016FIF
Bindu Ananth, Chair, IFMR Trust, a leading financial inclusion platform in India. Bindu co-edited Financial Engineering for Low-Income Households, a book published by SAGE. Her work has also been published in Economic and Political Weekly, the OECD Trade Paper Series, and the Small Enterprise Development Journal. She is a fellow of the Global Economic Society, was a member of the RBI Committee on Comprehensive Financial Services (2013), and the Government of India’s High Level Committee on Women (2014). Previously she worked in ICICI Bank’s Microfinance Institution and was Head of the New Product Development team within the Rural Banking Group. @IFMRTrust

Bryan Barnett, Banking Advisor, the Office of Technical Assistance (OTA) at U.S. Treasury. Dr. Barnett works with regulators in developing countries to expand access to the formal financial system and increase capacity for effective supervision of non-traditional financial service providers. He has been a consultant to the Microfinance Information Exchange, World Bank, USAID and the Gates Foundation. Prior to his work in financial inclusion he served in various roles at Microsoft Corporation, at investment firm Vulcan Northwest, as an attorney with the Colorado Legislature and as founder and Vice-President of ApexLearning, a pioneering online learning company.

Carol Coye Benson, founding partner of Glenbrook Partners, a payments industry strategy consulting firm. Carol’s work focuses on new product adoption, mobile payments, business-to-business payments, and payments infrastructure issues worldwide. Carol has more than 25 years of experience in financial services product, marketing, and strategy development with leading financial services providers. Before founding Glenbrook Partners, Carol was a managing director of the Global Institutional Services division of Deutsche Bank, leading marketing, client online services, and Internet development. At Visa International, she led groups working on eCommerce card security, database marketing, and technology investments. Also with Visa International, Carol founded and managed a European product development office, where she managed a series of eCommerce and chip-card projects for banks across Europe.

Colleen Briggs, Executive Director of Community Innovation, JP Morgan Chase & Co. Ms. Briggs is responsible for establishing and executing the firm’s philanthropic and corporate responsibility strategy in Financial Capability, including the Financial Solutions Lab. The Lab is a $30 million, five-year initiative that convenes leading experts in technology, behavioral economics and design to improve consumer financial health. Prior to joining JP Morgan, Ms. Briggs was the Economic Policy Advisor to Senator Debbie Stabenow, managing the Senator’s economic portfolio including policy related to banking, derivatives oversight, tax, manufacturing, small business, job creation, housing and pensions. @jpmorgan

#2016FIF
SPEAKER BIOS

**Martin Cihak**, Monetary and Capital Markets Advisor, IMF. Martin Čihák is an Advisor in the IMF’s Monetary and Capital Markets Department, where he analyzes global capital markets. His work has covered financial stability assessments and stress testing, financial deepening, financial inclusion, financial sector regulation, and the role of the state in finance. @IMF

**Michael Collins**, Faculty Director, Center for Financial Security, University of Wisconsin. He is the Fetzer Family Chair in Consumer & Personal Finance in the School of Human Ecology, an Associate Professor at the La Follette School of Public Affairs, a family economics specialist for UW-Extension, Cooperative Extension, and an affiliate of the Institute for Research on Poverty and Center for Demography and Ecology. @jmcollinswisc

**Gil Crawford**, co-founder and CEO, MicroVest Capital Management. As MicroVest’s CEO, he led the launch of MicroVest I, LP, the first commercial private equity vehicle focused on microfinance in North America. Today, he serves as Chief Executive Officer, responsible for leading the company’s investment operations and strategy.

**Keith Davies**, CFO and Partner, Zoona. Mr. Davies is the CFO and Partner at Zoona, a fintech business currently operating in Zambia, Malawi and Mozambique. He has been with the business from start-up to scale-up and currently leads the Finance, Data Analytics, Risk & Compliance and Legal/Regulatory functions of the business. He has raised two rounds of equity funding as well as several debt and grant facilities for Zoona. Prior to Zoona, Mr. Davies was in investment banking in South Africa. @kdavies24

**Annie Donovan**, Director, CDFI Fund. Donovan is formerly the Chief Executive Officer of CoMetrics, a social enterprise that provides high quality, affordable business intelligence tools to small businesses and nonprofits seeking to improve financial management, better measure social impact, and increase their capacity for innovation. Prior to CoMetrics, Donovan was Senior Policy Advisor to the White House, working collaboratively with the Office of Social Innovation and the Council on Environmental Quality. @ADonovanCDFI

**Tilman Ehrbeck**, Partner, Omidyar Network. Dr. Ehrbeck is responsible for teams that are advancing empowerment in the areas of financial inclusion, impact investing, and property rights, overseeing Omidyar Network’s investment relationships with a number of private and public sector organizations around the globe. Previously, Dr. Ehrbeck served as CEO of the Consultative Group to Assist the Poor (CGAP). @OmidyarNetwork

#2016FIF
SPEAKER BIOS

Timothy Flacke, Executive Director, Commonwealth. Commonwealth (formerly D2D Fund), is a mission-driven organization that builds solutions to make people financially secure. Commonwealth collaborates with consumers, the financial services industry, policy makers, and mission-driven organizations to discover ideas, pilot solutions, and drive innovations to scale. Mr. Flacke previously worked as an independent consultant, author, grant writer and VISTA volunteer in the field of financial empowerment and asset development, and held leadership positions in corporate human resources and risk management for Filene’s Basement, Inc. @buildcommwealth

Amy Friend, Senior Deputy Comptroller and Chief Counsel (OCC). In this role, Ms. Friend oversees all of the agency’s legal activities including legal advisory services to banks and examiners, enforcement and compliance activities, litigation, legislative initiatives, and regulation of securities and corporate practices of national banks. Ms. Friend further oversees the agency’s licensing and community affairs functions. She is a member of the agency’s Executive Committee. Prior to returning to the OCC in this role, Ms. Friend served as Managing Director at Promontory Financial Group from 2011 advising clients on a variety of regulatory, strategic, and compliance issues. @USOCC

Amias Gerety, U.S. Department of the Treasury’s Acting Assistant Secretary for Financial Institutions. In this role, Mr. Gerety is responsible for developing and coordinating Treasury’s policies on a wide range of issues affecting financial institutions from cybersecurity for the financial system to consumer policy, and from large, complex financial institutions to community banks. Mr. Gerety is also responsible for overseeing several Treasury Department programs including the Community Development Financial Institutions (CDFI) Fund, the State Small Business Credit Initiative (SSBCI), and the Small Business Lending Fund (SBLF). He joined Treasury in January 2009, and was nominated by President Obama to serve as Assistant Secretary in February 2015. @USTreasury

Gloria Grandolini, Senior Director, Finance & Markets, World Bank. Dr. Grandolini is responsible for delivering tailored and comprehensive development solutions, integrating World Bank Group financial, knowledge/advisory, and convening services to public sector clients including loans and credit, guarantees, and risk management products. Previous to her current position, Dr. Grandolini served as Country Director for Mexico and Colombia. In addition to her managerial experience, Dr. Grandolini has hands-on operational and market experience in financial sector development, pensions and insurance, disaster risk management, capital markets, infrastructure finance, and the full range of WBG financial products. @WorldBank

#2016FIF
Sanjay Jain, active volunteer with iSPIRT and active member of Open API. Mr. Jain volunteers with iSPIRT, a software product industry think tank and is an active member of the Open API and cashless India teams. Jain has been working with the NPCI to define the next generation payment systems (the Unified Payment Interface), as well as with regulators and other bodies to help entire processes go paperless. He has been one of the key contributors to help create and promote various government open APIs, collectively referred to as the India Stack. @snjyjn

Priya Jaisinghani, Director of the Center for Digital Development within the US Global Development Lab for the U.S. Agency for International Development. In this role Jaisinghani leads the agency’s efforts to leverage digital technologies and data analysis systems to dramatically enhance the agency’s development outcomes. She oversees programs across Africa, Asia and Latin America that increase access to the internet, and promote usage of digital financial services and integrated data systems. She also oversees USAID’s internal data analysis center which serves USAID in improved, data-informed decision making using geospatial, social media and other data analytics tools. Prior to USAID, she served as Program Officer at the Bill and Melinda Gates Foundation, where she helped to launch a $1 billion Global Development Program. @GlobalDevLab

Kody H. Kinsley, Assistant Secretary for Management (ASM) for the U.S. Department of the Treasury. Mr. Kinsley serves as principal advisor to the Secretary and the Deputy Secretary. Mr. Kinsley leads an organization with over 500 staff members responsible for setting Department-wide policy for all Treasury operations, including Treasury’s bureaus. Previously worked as a Policy Analyst with the White House Domestic Policy Council and as the Director of Policy and Program Support at the District of Columbia Department of Human Services. Mr. Kinsley’s previous work in private and public sectors focused on healthcare management and health IT implementation at the federal, state, and local levels. @USTreasury

Melissa Koide, Deputy Assistant Secretary for Consumer Policy, U.S. Department of the Treasury. In addition to leading Treasury’s consumer policy agenda, Ms. Koide leads Treasury’s efforts to examine emerging trends in financial services and the growing use of technology and data in financial services. Ms. Koide supports the Secretary in his leadership of the Financial Literacy and Education Commission, and she serves as the Executive Director for the President’s Advisory Council on Financial Capability. @USTreasury
Alexia Latortue, Principal Deputy Assistant Secretary for International Development Policy at the U.S. Department of the Treasury. Latortue leads efforts to promote inclusive growth and poverty reduction in developing and emerging countries through engagement with multilateral development banks, including the World Bank and the regional development banks. She also advises on priority reforms and innovative financing proposals for development and shapes policy priorities and positions on key development issues such as infrastructure finance, financial and social inclusion, and debt. Prior to Treasury, Latortue spent 10 years with the World Bank where her last assignment was Deputy CEO of the Consultative Group to Assist the Poor (CGAP), a unit dedicated to advancing financial inclusion. @USTreasury

Andrea Levere, President, Corporation for Enterprise Development. Ms. Levere has led the Corporation for Enterprise Development (CFED) since 2004, overseeing national initiatives to expand matched savings for children and youth, bring self-employed entrepreneurs into the financial mainstream and turn manufactured housing into an appreciating asset. Currently she serves as the Chair of ROC USA (Resident Owned Communities USA), and is a member of the FDIC’s Committee on Economic Inclusion, Morgan Stanley’s Community Development Advisory Board, and JPMC’s Consumer Advisory Council. In 2013 President Obama appointed Ms. Levere to the National Cooperative Bank’s (NCB) Board of Directors to represent the interests of low-income consumers. @cfed

Elizabeth Littlefield, President and CEO, Overseas Private Investment Corporation (OPIC). Littlefield was appointed by President Obama as the President and CEO of OPIC, an Under Secretary level position. Under Littlefield’s leadership, OPIC’s annual commitments to renewable resources projects grew ten-fold in three years to $1.5 billion, while generating increasing income for the federal budget – a number that reached $426 million in 2013. She has also instituted major reforms of the agency’s policies, systems and processes and introduced new financial innovations to augment the agency’s development impact. Ms. Littlefield has been appointed by President Obama to serve as a member of the White House Development Council and the President’s Export Council. Ms. Littlefield was presented in 2012 with the Secretary’s Distinguished Service Award, the highest award in the Foreign Service, by Secretary Hillary Clinton. @OPICgov

#2016FIF
SPEAKER BIOS

Timothy Lyman, lead for CGAP’s Global Policy Architecture Initiative. Mr. Lyman leads CGAP’s work to incorporate consideration of financial inclusion in the work of the global financial sector standard-setting bodies, including as lead Implementing partner on the workstream of the G20 Global Partnership for Financial Inclusion (GPFI) focused on the standard setters. Mr. Lyman co-authored CGAP’s Guide to Regulation and Supervision of Microfinance and began the group’s pioneering Focus Notes series on branchless banking regulation. He currently serves as Vice Chair of the Financial Inclusion Workstream of the Basel Consultative Group, an outreach arm of the Basel Committee.

Barbara Magnoni, President, EA Consultants. Ms. Magnoni currently leads EA Consultants after working on Wall Street as an emerging market strategist. As a consultant, she has advised governments, financial institutions, insurers, and international donors on improving access to inclusive financial services and health financing in the Americas as well as worldwide, including BanRural in Guatemala, Aterna in Mexico, and INISER in Nicaragua. She is currently working with one of Peru’s largest microfinance institutions to develop a responsible sales and marketing strategy for insurance, with an emphasis on crop insurance.

Kathleen (Kay) McGowan, Digital Finance Lead, USAID/Global Development Lab. Ms. McGowan leads the Agency’s efforts to foster the growth of sustainable, ultra-inclusive economic infrastructure to expand financial inclusion, build market systems that support pathways out of poverty, and improve governance and economic participation in countries where USAID invests. She oversees efforts within USAID to reform procurement policy and position Agency programming to accelerate the growth of inclusive electronic payment systems. @GlobalDevLab

Jonathan Morduch, Professor of Public Policy and Economics at New York University. Jonathan Morduch is Professor of Public Policy and Economics at the NYU Wagner Graduate School of Public Service. He is the author with Rachel Schneider of The Financial Diaries: How American Families Cope in a World of Uncertainty (Princeton 2017). He is a co-author of Portfolios of the Poor: How the World’s Poor Live on $2 a Day (Princeton 2009). Morduch is a founder and Executive Director of the NYU Financial Access Initiative. @JMorduch

Sarah Newcomb, Behavioral Economist, Morningstar. Dr. Newcomb is a behavioral economist at Morningstar, integrating findings from behavioral science into tools for financial advisors and individual investors. Her work involves the human side of money has earned mentions in the New York Times, Washington Post, Reuters, Money, MarketWatch, and Bloomberg. She is a regular contributor to PsychologyToday.com, and the author of LOADED: Money, psychology, and how to get ahead without leaving your values behind. @finance_therapy

#2016FIF
SPEAKER BIOS

Mark Pearce, Director, Division of Depositor and Consumer Protection, Federal Deposit Insurance Corporation. The Division of Depositor and Consumer Protection, which Mark leads, has responsibility for the FDIC’s compliance and CRA examination and supervision for approximately 4,000 state non-member institutions, research and policy development related to consumer use of financial products and services, depositor and consumer assistance, community affairs, financial education and economic inclusion efforts. @FDICgov

Patrice Peyret, Co-Founder and CEO, Banking Up. Patrice co-founded Banking Up (formerly Plastyc) with the vision that everyone deserves good banking services no matter their income, age and bankability. Previously he was CEO of Mobileway, an international mobile messaging company now part of SAP, and was in charge of Java for cell phones and smart cards at Sun Microsystems after Sun acquired Patrice’s first start-up company. Prior to his start-up roles, Patrice worked for large companies: Gemalto, the world’s largest payment and SIM cards manufacturer, Thomson-RCA and Schlumberger. @BankingUp

David Porteous, Consultant, BFA Global. David Porteous has undertaken consultancy assignments in the areas of financial strategy and policy for a wide range of clients including public clients such as DFID, the World Bank, CGAP, and private clients including banking and telco groups. Porteous was active in executive leadership roles in the development finance sector of South Africa with private and public financial institutions as well as FinMark Trust, an NGO involved in promoting financial inclusion policies and projects, and a public-private partnership which sought to promote low-income housing securitization. @BFAGlobal

Jose Quiñonez, Founder and CEO, Mission Asset Fund. MAF is an award-winning nonprofit with an innovative nationwide model for integrating financially excluded, low-income communities into the financial mainstream. For his work, Mr. Quiñonez was awarded the MacArthur Fellowship, the Ashoka Fellowship, and the Aspen Institute Fellowship. He served on the Board of Directors for Credit Builders Alliance and Opportunity Fund and is currently a member of Experian’s and Capital One’s Consumer Advisory Councils. In 2012, he was appointed as the inaugural Chair of the Consumer Advisory Board of the U.S. Consumer Financial Protection Bureau. @JQ_MAF

#2016FIF
Louisa M. Quittman, Director, Office of Financial Security, U.S. Department of the Treasury. Louisa Quittman is responsible for policy development and coordination related to promoting the financial education and capability, consumer savings, and related topics to improve the financial security of Americans. She provides a lead role in developing and implementing the Treasury’s domestic financial inclusion agenda, coordinates the interagency Financial Literacy and Education Commission and coordinated President’s Advisory Councils on Financial Capability.

Ida Rademacher, Executive Director, Financial Security Program, Aspen Institute. Rademacher oversees policy research on how labor and financial markets influence household economic decision-making and opportunity. She assists government and financial services leaders in creating products and policies to allow individuals and families to save, invest, own and retire. Rademacher formerly served as Chief Program Officer at the Corporation for Enterprise Development (CFED), and built multi-institutional teams to support the U.S. Consumer Financial Protection Bureau’s Consumer Financial Well-Being Metrics Project, the Department of Health and Human Services ASSETS Initiative, and the U.S. Department of Treasury’s Assessing Financial Capability Outcomes Initiative. @idarademacher

Kim Saunders, Founder and CEO of the Eads Group, Inc. (EGI). Ms. Saunders leads EGI in its commitment to serve Minority Depository Institutions (MDIs) and Community Development Financial Institutions (CDFIs). She has over 32 years of financial services industry experience, including over a decade of working with MDIs. She has also been involved in the start-up phase of three de novo banks.


Ellen Seidman, Senior Fellow, Urban Institute. Ellen Seidman is a Senior Fellow at the Urban Institute, working in housing finance, community development and consumer finance. Seidman is a member of the inaugural Consumer Advisory Board of the Consumer Financial Protection Bureau, serving from 2012 to 2016. She chairs the boards of Coastal Enterprises Inc. and Aeris Insight. Seidman also sits on the board of City First Bank of DC and on the National Community Advisory Council of Bank of America. @esseidman
SPEAKER BIOS

Andrée Simon, Co-CEO, FINCA Microfinance Holding Company (FMH). As Co-CEO, Andrée leads FINCA Microfinance Holding Company (FMH) in strategy, operations, and the implementation of a host of digital and mobile enhancements. Previously, Andrée served as VP, COO, and Deputy to the President & CEO, returning to FINCA after serving for several years as President and COO of Women for Women International, a non-profit organization.

Sun Tianqi, Deputy Director-General, Financial Consumer Protection Bureau, People’s Bank of China. Dr. Sun served as the Director of Statistic & Research Division of Xi’an Sub-branch of PBoC, and the Assistant Director of the Research Bureau of PBoC. In 2016, he became a Co-Chair of the Global Partnership for Financial Inclusion (GPFI). Dr. Sun’s research interests and publication topics include competition and monopoly, financial consumer protection, financial inclusion and regional economic development. He directed a major program of Key Research Institute in University launched by Ministry of Education. His research earned first prize several times by the National Development and Reform Commission, the People’s Bank of China, and Shaan’Xi Provincial Government.

Carolina Trivelli, Senior Researcher, Instituto de Estudios Peruanos. Trivelli is a former Minister of Development and Social Inclusion of Peru, and specializes in social policy, rural development and financial inclusion. She is a Board member of Pagos Digitales Peruanos S.A., President of Fundación Backus, member of the Board of Colegios Peruanos-Innova Schools and the International Advisory Board of RIMISP (Latin American Center for Rural Development). She serves as an independent Board member at the ExCom of CGAP and of the Global Innovation Fund. @IEPeruanos

John Won, Director, Financial Health Program, IDEO.org. Won guides teams in the Human-Centered Design process from behavioral insights to prototype tests, working closely with partner organizations to implement impactful solutions for low-income people. Mr. Won has led a range of design work focused on financial inclusion and digital financial services, including an improved customer-service experience for mobile money with Tigo Cash in Ghana and a smallholder-farmer centered suite of marketing and digital savings with Econet in Zimbabwe, both in partnership with the Consultative Group to Assist the Poor (CGAP). @wonjinkyu

#2016FIF
Forum Hosts

U.S. Department of the Treasury
U.S. Agency for International Development

Quick Links

Forum Site: FIForum.us
Social Media Hub: bit.ly/2016FIF
Social Media Toolkit: bit.ly/2016FIFKit