

MDI Partnership Summit

February 15, 2023

- 7:30 AM – 8:30 AM** **Breakfast**
- 8:30 AM – 8:45 AM** **Welcome and Introductions**
- Bryan Luke, ABA MDIAC Chair; President and CEO, Hawaii National Bank
- 8:45 AM – 9:15 AM** **Creating Mutually-Beneficial Long-Term Partnerships**
A keynote address on best practices for creating sustainable and enduring partnerships.
- Kenneth Kelly, Chairman and CEO, First Independence Bank
 - Naomi Camper, Chief Policy Officer, American Bankers Association
- 9:15 AM – 10:00 AM** **Deposit Placement**
Learn about different tools and approaches to facilitate reciprocal deposit placement in MDI banks, and the associated CRA benefits.
- Steve Kinner, Senior Managing Director, IntraFi
 - Dan Letendre, Managing Director, Bank of America
 - Dominik Mjartan, President and CEO, Optus Bank
 - Carlos Naudon, President and CEO, Ponce Bank
- 10:00 AM – 10:15 AM** **Break**
- 10:15 AM – 11:00 AM** **Loan Participations: What Works and Doesn't Work**
This session will discuss how to structure loan participations for maximum benefit for all partners, as well as opportunities for “reverse” syndications with MDIs.
- Jonathan Jacob, Head of MDI & Strategic Client Partnerships, Wells Fargo

- Thomas Ogaard, President and CEO, Native American Bank
- Joe Ritchie, Managing Director, Business Development, Diversity, Equity and Inclusion, Tishman Speyer
- Evelyn Smalls, President and CEO, United Bank of Philadelphia

11:00 AM – 11:30 AM Lightning Round: How To...

Get step-by-step instructions on how to implement specific partnership models.

- **Opening Your ATM Network to MDI Partners**
 - Wendi Boyen, Community Advocacy and Financial Wellness, Regions Bank
- **Supporting Branching into New Markets**
 - Hideo Core, Senior Vice President, Fifth Third Bank

11:30 AM – 11:55 AM Open Mic Session

The floor is yours. Pose a question to the group, share information about programs your bank offers or needs your bank is trying to address, solicit feedback or highlight challenges.

- Moderator: Nicole A. Elam, Esq., President and CEO, National Bankers Association

11:55 AM – 12:00 PM Closing Remarks/Session/Next Steps

- Nicole Elam, Esq., President and CEO, National Bankers Association