

As of 8/4/2014



AICCCA 21st^h Annual Conference

March 31-April 2, 2014

Fairmont San Francisco

950 Mason Street

San Francisco, CA 94108

Call 800-441-1414 and ask for the "AICCCA" block of rooms

\$219 single or double, until February 28, 2014 or block is full, whichever occurs first

SUNDAY, March 30, 2014

**7:30 a.m.-1:00 p.m. Golf Outing at the Presidio Golf Course-scramble format-all levels welcome!
Bus pick up at hotel at 7:30 a.m.**

2:00 p.m.-6:00 p.m. Board of Directors Meeting-California Room

2:00 p.m.-5:00 p.m. Little Italy and North Beach Walking Tour (ticketed event) Definitely one for the food lovers, the Little Italy and North Beach Walking Tour is a glimpse into the blend of culture and cuisine of San Francisco. Stroll amongst the cafes and bakeries of North Beach, San Francisco's own Little Italy.

Highlights Include: Walking tour through San Francisco's Little Italy and North Beach; Culinary history of San Francisco; Taste samples of fresh food at local bakeries and delis.

MONDAY, March 31, 2014

Main Sessions held in Terrace Room

Technology-Sponsored by Citibank

8:00 a.m. - 5:00 p.m. Registration

9:00 a.m. – 1:00 p.m. AICCCA Members' Only Meeting

1:00 p.m.-2:00 p.m. Deli lunch for AICCCA Members-Sponsored by Citibank

**2:00 p.m.-2:05 p.m. Welcoming Remarks
David C. Jones, Ph.D., President**

**2:05 p.m.-2:10 p.m. Welcome to San Francisco!
[José Cisneros](#)
Treasurer for City and County of San Francisco
San Francisco, CA**

Working in Tandem Effectively with Local Officials

- 2:10 p.m.-2:50 p.m. [Marco Chavarin](#)
San Francisco, Office of Financial Empowerment
San Francisco, CA
- 2:50 p.m.-3:00 p.m. Break-Sponsored by Capital One
- 3:00 p.m.-3:45 p.m. Where Did the Money Go?

[Prof. Katherine Porter](#)
California Monitor for the National Mortgage Settlement Program and
Professor of Law at University of California Irvine School of Law
Los Angeles, CA
- 3:45 p.m.-4:30 p.m. Sector-Wide Opportunities and Challenges

[Susan C. Keating](#)
President and CEO
NFCC
Washington, D.C.
- 12:00 p.m. – 7:00 p.m. Exhibitors Setup
- 6:00 p.m. – 7:30 p.m. Welcome Reception and Sommelier Experience-Sponsored by MasterCard
RPPS

TUESDAY April 1, 2014

GENERAL SESSIONS

A/V and Internet-Sponsored by Citibank

- 8:00 a.m. – 5:00 p.m. Registration
- 8:00 a.m. – 9:00 a.m. Continental Breakfast-Sponsored by Bank of America
- 9:00 a.m. – 9:45 a.m. To Merge or Not To Merge? CredAbility and Clearpoint Share Their Experiences
[Chris Honenberger](#)
CEO, Clearpoint
Richmond, VA

[Phil Baldwin](#)
Former CEO of CredAbility
Atlanta, GA

- 9:45 a.m.-10:30 a.m. **The CFPB and Credit Reporting Markets**
[Corey Stone](#)
 CFPB
 Assistant Director, Office of Credit Information, Collections and Deposits
 Markets
 Washington, D.C.
- 10:30 a.m.-10:45 a.m. **Break-Sponsored by Capital One**
- 10:45 a.m. – 12:00 p.m. **Start Off on the Right Foot with Student Loan Counseling: Protocol and Compliance**
 George Janus
[Consumer Debt Counselors, Inc.](#)
 Winter Park, FL
- [Robby Birnbaum, Esq.](#)
 Partner, Regulatory Compliance
 Greenspoon Marder
- 12:00 p.m.-12:15 p.m. **Exhibitor Focus (5 Exhibitors, 3 minutes each)**
- 12:15 p.m.-1:15 p.m. **LUNCH – (for all registered attendees)-Sponsored by Citibank**
- 1:15 p.m. – 2:15 p.m. **Evolving Business Models: Partnerships as an Opportunity for Growth**
[Todd Emerson](#)
 CEO and President for Springboard Nonprofit Consumer Credit Management
 Riverside, CA
- [John Fisher](#)
 Chief Relationship Officer, Money Management International
 Houston, TX
- 2:15 p.m.-2:30 p.m. **Managed Services, Security and Compliance Break-Sponsored by Peregrin Services**
- 2:30 p.m.-3:15 p.m. **Creditor Sessions**
 PLEASE NOTE, AT THE REQUEST OF THE CREDITORS WE ASK THAT ONLY
 NON-PROFIT CREDIT COUNSELING AGENCIES ATTEND THE CREDITOR
 BREAKOUT SESSION-All sessions will be held in the main room with the
 following schedule:
 2:30 p.m.-2:50 p.m.-Wells Fargo
 2:50 p.m.-3:10 p.m.-Bank of America

3:15 p.m.-3:30 p.m. Break-Sponsored by Venable LLP

3:30p.m. – 6:30 p.m. Interactive Workshops-An Opportunity to Discuss in Further Detail
Non-Profit Credit Counseling Agencies ONLY are allowed to participate in the Workshops Small group roundtable discussions moderated by agency heads to discuss issues affecting EVERY agency. This is your time to ask questions regarding issues your agency is facing and get input and advice from your colleagues in a give and take environment. Attendees are welcome to attend one, two or all 3 of the sessions!

3:30-4:30 p.m. How Do You Work with THIS Regulator?
[Sam Hohman](#) (Creditor Advisors Foundation)
[Melissa Pearson](#) (Debt Reduction Services)
[Zynda Sellers](#) (Money Management International)
[Marty Lynch](#) (Cambridge Credit Counseling, via Skype)

4:30-5:30 p.m. Housing and Partnership Funding
[Rick Harper](#) (CCCS SF)

5:30-6:30 p.m. Cloud-y Days Ahead? What you need to know about using the Cloud and external expectations of your Data Security Mike Morency and Jody Donaldson of [Peregrin](#) will share with you Peregrin's experiences over 10 years of Information Security assessments & reviews by financial institutions and others. What does that have to do with the Cloud? If you handle consumer data, you need to know what's in store for you in 2015 and beyond.

6:30 p.m.-7:30 p.m. Reception-Sponsored by The Allocation Company, Inc.

WEDNESDAY, April 2, 2014

A/V and Internet-Sponsored by Citibank

8:00 a.m. – 9:00 a.m. Continental Breakfast-Sponsored by Bank of America

8:50 a.m. – 9:00 a.m. Exhibitor's Prize Giveaways (During Breakfast)
Attendees must be present to win any prizes/awards by Exhibitors.

9:00 a.m.-9:45 a.m. Economy/Current Financial Picture
[Colleen Ambrose](#)
Vice President and Client Portfolio Manager
American Century Mutual Funds
Mountain View, CA

9:45 a.m.-10:45 a.m. Legal and Regulatory Update

[Jonathan Pompan](#)

Attorney

Venable

Washington, D.C.

10:45 a.m.-11:00 a.m. Break-sponsored by Citibank

11:00 a.m.- 11:40 a.m. Creditor Sessions

PLEASE NOTE, AT THE REQUEST OF THE CREDITORS WE ASK THAT ONLY NON-PROFIT CREDIT COUNSELING AGENCIES ATTEND THE CREDITOR BREAKOUT SESSION-All sessions will be held in the main room with the following schedule:

11:00 a.m.-11:20 a.m.-Citibank

11:20 a.m.-11:40 a.m.-Capital One

AICCCA Conference Adjourned

12:30 p.m.-7:00 p.m. Wine Country Lunch and Tour

Enjoy a private, guided tour with Gary who will regale you with local highlights on your way to a lunch spot with a great view. From there you will proceed to world famous Sonoma Valley and Los Carneros to sample 3-4 of California's best wineries (sorry-no time to try all 400!). Lunch and tasting fees (\$10-\$20 per winery) are not included in the registration fee, so please plan appropriately. The tour is limited to 11 people, so register early!