



**Financial Counseling Association of America
Sheraton Salt Lake City
May 10th-12th 2023**

CONFERENCE AGENDA

Wednesday May 10th

<i>Board Meeting</i>	9:00 am - 1:00 pm	Orion
<i>Members Only</i>	2:30 pm - 5:00 pm	Arches Ballroom
<i>Opening Reception</i>	5:00 pm - 7:00 pm	Bryce

Thursday May 11th

Conference Sessions in Arches Ballroom

<i>BREAKFAST</i>	8:00 am - 8:50 am	Deer Valley
<i>Opening Remarks</i>	9:00 am - 9:15 am	Marty Lynch, President FCAA
<i>Session I</i>	9:15 am - 10:15 am	Community Reinvestment Act: How Can Banks and Credit Counseling Agencies Partner? Kim Hannay, CRA Officer Optum Bank and Chair, CRA Committee Utah Bankers Association joined by Dan Archibald CRA Officer/VP Community Development Celtic Bank; Alan Urie SR VP/CRA Officer Synchrony Bank
<i>Session II</i>	10:15 am - 11:15 am	Strategies for Successfully Engaging with Young Adults Ann House, Director of the Financial Wellness Center and Adjunct Assistant Professor, University of Utah
Break	11:15 am- 11:25 am	
<i>Session III</i>	11:30 am - 12:25 pm	Converting Web Leads

Roundtable Moderated by Michael Morency, Peregrin and joined by Paul DeSaulniers, Experian; Robb Czyzewski, CESI; Phil Heinemann, DMCC; Gary Herman, Consolidated Credit

LUNCH 12:30 pm - 1:30 pm

Deer Valley

AFTERNOON SESSIONS

Session IV 1:40 pm – 2:30 pm

Washington D.C. Regulatory and Legislative Overview
Jonathan Pompan, Esq. Venable LLP
Chair of Venable’s Consumer Financial Services Practice Group and CFPB Task Force

Session V 2:30 pm- 3:25 pm

Scams and Frauds; Don’t Let it Happen to You. Adam Watson, Chief Investigator, Utah
Division of Consumer Protection

Vendor Break 3:30 pm- 3:45 pm

Clerkie

Session VI 3:50 pm – 5:00 pm

Creating Partnerships and Leveraging Resources with Social Service Providers; Preston Cochrane, V.P. Housing & Support Services, Valley Behavioral Health of Salt Lake City, Lindsey Nelson, Executive Assistant and Co-Creator and Leader of the Financial Success Program at The Other Side Academy. Joining Preston and Lindsey will be Dave Dourocher, Executive Director of The Other Side Academy.

Cocktail Reception 6:00 pm- 7:30 pm

The Church at Lake Effect
155 W 200 S



Friday May 12th

Conference Sessions in Arches Ballroom

BREAKFAST

8:15 am – 9:00 am

Deer Valley

MORNING SESSIONS

Session I

9:15 am – 10:15 am

Update on Credit Counseling Product Expansion, Christopher Viale, President/CEO Cambridge Credit Counseling and VP Co-Chair FCAA and Michael Croxson CEO NFCC

Session II

10:15 am- 11:15 noon

State Standards Initiative
Marty Lynch, President FCAA and Compliance Officer and Director of Education, Cambridge Credit Counseling

CLOSING REMARKS