



“MEETING THE MOMENT”

Annual Meeting | October 19-21

TUESDAY, OCTOBER 19th

6:00pm **OPENING PLENARY (Centennial Ballroom)**

6:00pm **Welcome/Intro Maggie Linton**

Lance Triggs, President of Operations, Operation HOPE

6:05pm **“A Conversation with Shopify President Harley Finkelstein”**

Harley Finkelstein, President, Shopify

Moderator: John Hope Bryant, Founder and CEO, Operation HOPE

6:20pm **1 Million Black Business Pitch Competition**

Introductions:

- Judge #1 Jayson Brown, Merchant Success Sr. Lead, Shopify
- Judge #2 Pinky Cole, Founder and Visionary, Slutty Vegan
- Judge #3 Reggie Love, Sr. Advisor, Apollo Global Management
- Judge #4 Sara Raffa, Director, Business Development, 25madison
- Judge #5 John Hope Bryant, Founder and CEO, Operation HOPE

- Contestant #1 Pitch
- Contestant #2 Pitch
- Contestant #3 Pitch

- Judges Huddle

- Winner Announced

- 6:45 pm **“A Conversation with PayPal CEO Dan Schulman”**

Dan Schulman, President and CEO, PayPal
Moderator: John Hope Bryant, Founder and CEO, Operation HOPE
- 7:05pm **“Into the Future: What We Don’t Know That We Should”**

Sam Altman, Founder and CEO, Open AI
Moderator: John Hope Bryant, Founder and CEO, Operation HOPE
- 7:20pm **“Inside the Boardroom: A Conversation with Fortune CEO Alan Murray”**
Alan Murray, CEO, Fortune
Moderator: John Hope Bryant, Founder and CEO, Operation HOPE
- 7:40pm **“Educating America: A Conversation with Khan Academy Founder Sal Khan”**
Sal Khan, Founder and CEO, The Khan Academy
Moderator: John Hope Bryant, Founder and CEO, Operation HOPE
- 8:00pm **“Building the Etsy Economy: A Conversation with Etsy CEO Josh Silverman”**
Josh Silverman, CEO, Etsy
Moderator: John Hope Bryant, Founder and CEO, Operation HOPE
- 8:20pm **Special Guest:**
Chris Tucker, Actor/Comedian
John Hope Bryant, Founder and CEO, Operation HOPE
Ambassador Andrew Young
- 8:40pm **Concluding Remarks/Maggie Linton**

WEDNESDAY, OCTOBER 20th

9:00am STRAIGHT TALKS (Regency Ballrooms)

The Equity Solution: Inclusion as a Growth Strategy

Whether dispersed through a multinational corporation, embedded in the culture of a feisty start-up, or the outgrowth of welcoming communities, diversity and inclusion are good for business. Across the U.S., hotbeds of economic growth and innovation take place within our most diverse cities. Smaller communities that foster innovation and attract start-ups and R&D, also embrace diversity as a way to recruit top talent. According to the Center for Talent Innovation, diverse and inclusive organizations are likely to **improve** market share by 45%.

In the wake of the murder of George Floyd, many organizations recognized that nods to social justice and inclusion practices was no longer sufficient. In many cases, their employees and customers demanded more. In other instances, bold leaders acknowledged areas where they could do better, even if that meant undermining their short-term interests.

How would the economy benefit from increased racial inclusion? How can leaders ensure that diversity and inclusion efforts are not simply hollow gestures, but become a ***mindset*** within their organizations? How is success defined?

Speakers:

Robert Marchman, Senior Policy Advisor on Diversity and Inclusion, SEC

Nikita Pearson, Director of the Office of Minority and Women Inclusion, FDIC

Allison Robinson, Executive Vice President, Head of Emerging Markets, Truist

Moderator: La'Kerri Jackson, Director, Social Impact and the UPS Foundation

Phi Beta Sigma: A Historical Blueprint of Empowering Economic Engagement in the Black Community

Phi Beta Sigma Fraternity's conversation will explore the organization's 100-year history and strategy of providing business development and sustainability assistance to the communities served since its founding and continues to serve today. The Fraternity will discuss its goal to boost economic engagement for businesses operating within and beyond the majority Black community. Key members will provide an overview of what the organization has done, is continuing to do, and is planning to do to empower Black spending and engage business development in minority communities in America.

Speakers:

Daryl Anderson, International Executive Director, Phi Beta Sigma

Michael Cristal, Immediate Past President, Phi Beta Sigma

Kendrick Faison, PAC Chair, Phi Beta Sigma

Chris Rey, International President, Phi Beta Sigma

Reginald Sluch, Past Director, Bigger and Better Business, Phi Beta Sigma

A Tale of Two Recoveries: Who's Winning and Who's Left Behind

The economic downturn caused by the COVID-19 pandemic has created widely different experiences across industries, regions and demographic groups. As the pandemic spread unchecked during the spring of 2020, spending on consumer services contracted in ways not seen since the Great Depression, and has yet to fully recover.

Of the 22 million jobs lost in March 2020, nearly 19 million were in service providing businesses, primarily affecting already vulnerable low-wage workers. Other industries, such as financial services, experienced shallower dips in unemployment, and were better suited to quickly shift to remote work.

These dynamics have disproportionately hurt women, non-whites, low-wage earners and those with less education. They also instigated survival-based innovations in how we deliver services, reshaped the future of work for millions of Americans, and initiated a reckoning among workers that has caused them to rethink their priorities, examine their values and reconsider their relationship to their current employment.

Can we expect these types of health pandemics to become ongoing threats? Has the government's fiscal interventions merely prolonged a reckoning around the economic vulnerability many Americans are exposed to? What can be done to ensure broader participation in the economy?

Speakers:

Aron Levy, Director, Individual and Community Preparedness Division, FEMA

Trevor Rigger, Sr. Vice President, Disaster Cycle Services, American Red Cross

Arjit Roy, EVP, Deposits, Small Business Banking, Strategy and Analytics, Truist

Moderator: Kenneth Corbin, Chief Taxpayer Experience Officer, Internal Revenue Service

A Winning Mindset: Creating Life Balance to Achieve Success

As the demands of work continue to grow, it is becoming harder and harder for working adults to achieve balance in their life. Many feel they have to make a choice between career and everything else meaningful to them. A significant number of organizations and industries

foster a culture that encourages and thrives on such thinking. The economic crisis resulting from the pandemic has only exposed and amplified these existing dynamics.

The mass migration to remote work exacerbated the feeling of never being “unplugged”. The boundaries between home and work have blurred to the point of no longer being identifiable. Lower wage earners additional stressors, including being exposed to higher health risks, due to the nature of their work.

How can we thrive and succeed at work, while still finding time for the things that are important to us? What types of habits and activities can help us accomplish this? Some individuals are overwhelmed from the moment they wake up until bedtime with children, work, commute, meals; how can they possibly find time for themselves, much less to create balance?

Speakers:

Angel Livas, Visionary, The Eclectic Entrepreneur and Producer, Under Construction with Tamar Braxton

Moderator: Yolande Matthew, Emerging Markets Performance Manager, Truist

10:00am OPENING PLENARY (Centennial Ballroom)

10:00am **Welcome/Intro Maggie Linton**
Lance Triggs, President of Operations, Operation HOPE

10:05am **“Meeting the Moment”**

James Manyika, Chairman and Director, McKinsey Global Institute
Moderator: Frank Holland, Reporter, CNBC

10:20am **“Finding HOPE in America’s Communities”**

Honorable Lorraine Cochran-Johnson, Commissioner, DeKalb County, Georgia
Honorable Melissa Conyears-Ervin, Treasurer, City of Chicago
Honorable Jim Strickland, Mayor, City of Memphis
Moderator: Lance Triggs, President of Operations, Operation HOPE

10:40am **“Banking on HOPE: Innovations in Uplift”**
Tim Welsh, Vice Chair, Consumer and Business Banking, U.S. Bank
Tim Wennes, CEO and Country Head, Santander US

Moderator: John Hope Bryant, Founder and CEO, Operation HOPE

11:00am **“Giving Voice to the Voiceless: A Correspondent’s View”**

Stephanie Ruhle, Sr. Business Correspondent, NBC News

11:20am **“Building Back Better: A Conversation with U.S. Secretary of Commerce Gina A. Raimondo”**

Honorable Gina A. Raimondo, Secretary, U.S. Department of Commerce

Moderator: John Hope Bryant, Founder and CEO, Operation HOPE

11:45am **“Finding Purpose: A Conversation with Bishop T.D. Jakes”**

Bishop T.D. Jakes, CEO, TDJ Enterprises

Moderator: John Hope Bryant, Founder and CEO, Operation HOPE

12:00pm LUNCH PLENARY (Centennial Ballroom)

12:05pm **“Transforming Communities with Care: A New Business Model”**

Brant Standridge, Chief Retail Community Banking Officer, Truist

Moderator: John Hope Bryant, Founder and CEO, Operation HOPE

12:25pm **LUNCH DROP**

12:25pm **“No Labels: Solutions from the Center”**

U.S. Representative Josh Gottheimer (NJ-5)

U.S. Representative Brian Fitzpatrick (PA-01)

Moderator: Ryan Clancy, Senior Advisor, No Labels

12:40pm **“If You Build It: The Power of Black Entrepreneurship”**

Ryan Wilson, Co-Founder and CEO, The Gathering Spot

Amir Windom, Grammy-Award Winning Record & Entertainment Executive

Moderator: Derek Dingle, Editor-in-Chief, Black Enterprise

1:05pm **“Mapping Self-Sufficiency: A Conversation with Experian CEO Craig Boundy”**

Craig Boundy, CEO, Experian N.A.

Moderator: John Hope Bryant, Founder and CEO, Operation HOPE

1:20pm **“The Future of Investing: A Conversation with Robinhood CEO Vlad Tenev”**

Vlad Tenev, Co-Founder and CEO, Robinhood

Moderator: John Hope Bryant, Founder and CEO, Operation HOPE

1:40pm **“Seeking Shelter from the Storm: A Conversation with Habitat for Humanity CEO Jonathan Reckford”**

Jonathan Reckford, CEO, Habitat for Humanity

Moderator: Stephen A. Ryan, Attorney at Law

1:50 pm **Concluding Remarks/Directions for Breakouts**

2:00pm IDEA LABS (Regency Ballrooms)

Advancing Racial Equity: Social Justice Through an Economic Lens

Our belief in equal opportunity and self-determination is considered part of the bedrock of our nation, and diversity is one of our country’s greatest strengths. But for too many, this version of the American Dream remains out of reach. Entrenched disparities in our laws and public policies, and in our public and private institutions, have often denied equal opportunity to individuals and communities.

The converging health and economic crises have exposed and spotlighted these inequities, while a historic social justice movement has put the spotlight on the no longer bearable human costs of systemic racism.

How can we increase income and opportunity for our most vulnerable communities? What can be done to grow wealth, particularly intergenerational wealth, in order to help families achieve greater security and social mobility? How can we reimagine our criminal justice system and the implications mass incarceration has on low-income people and communities of color?

Speakers:

Dondi Edwards, Sr. Vice President, Home Lending, Diverse Segments, Economic Impact and Growth, Wells Fargo

Hon. Ron Jarmin, Acting Director, U.S. Census Bureau

Zondwa Mandela, Chairman, Mandela Legacy Foundation

Josh Smith, Founder and CEO, 4th Purpose

Moderator: Maggie Linton, iHeart Radio

The Time is Now: Igniting Minority and Women-Owned Business

It is estimated that women and minority-owned businesses contribute \$400 billion to the economy and are responsible for over 2.2 million jobs. A Boston Consulting Group study showed that stronger and larger women and minority-owned companies would help rebuild low-and moderate-income communities, create jobs and enhance the tax base. It is also true that the majority of these businesses had no employees. What level of wealth and job creation could take place if more women and minorities became employers?

How can we increase the rates of business formation, and improve prospects for survival among start-ups and young businesses? What innovations exist around increasing access to capital? Given the influence of role models in strengthening success, how do we support peer networks for women and minority business owners?

Speakers:

Kimberly Dorsett, Executive Vice President, Truist

Robert Schapira, Sr. Vice President, Diverse Segments Leader – Small Business, Wells Fargo

Charmaine Ward, Director of Corporate Relations, Southern Company

Moderator: Angel Livas, Visionary, Eclectic Entrepreneur

On the Front Lines: How Financial Services Can Help Expand Economic Opportunity

Financial services are fundamental to economic growth, development and opportunity. Banking, savings, investment, insurance, and debt and equity financing help individuals save money, protect themselves from uncertainty and build credit. They also enable businesses to start up, innovate and expand, increase efficiency and compete in the marketplace. Too often, lower-income individuals and families have not been able to participate in these opportunities, and when they do, they remain vulnerable to predatory products and services.

In recent years, however, two major trends have begun to draw attention to the potential market opportunity with lower-income individuals and small businesses, catalyzing increased innovation to better serve these groups.

- 1) The poor are able to pay (often at very high interest rates for financial services, and
- 2) They present no greater credit risk than the average higher-income borrower. In fact, many microfinance institutions have better repayment rates than traditional commercial ones.

Coupled with the explosion of fintech and the access to new data it provides, an era of experimentation around these challenges has enabled promising business models to emerge.

How can the financial services sector continue to reevaluate its approach to increasing access? What innovations have proved effective, and what is on the horizon? How can we increase access to wealth builders, such as investments and homeownership?

Speakers:

Mercedes Garcia, Vice President, Community Relations, Mastercard
Bahari Harris, SVP, Emerging Markets Segment Strategy Manager, Truist
Lori Schock, Director, Office of Investor Education and Advocacy, SEC

Moderator: Reba Dominski, U.S. Bank, EVP, Chief Social Responsibility and President U.S. Bank Foundation

Banking on Inclusion: Driving Impact in a Post-COVID World

As the effects of the global pandemic and resulting economic crisis intersect with a growing social justice movement, issues of diversity and inclusion have been top-of-mind for many organizations, particularly financial institutions. Leaders have been reflecting on how to improve their diversity and inclusion initiatives both internally and externally, while not losing sight of the need to measure the success and impacts of their efforts.

A lack of inclusion for low-income Americans, in particular Black Americans, exists at every level of the financial system. Lack of access to financial services is not just a symptom of the racial wealth gap; it is also a cause. Without the ability to save, invest, and insure themselves against risk, many low-income and minority families struggle to convert the income they earn into any form of wealth. It has been stated the “Financial inclusion is the bridge between economic opportunity and outcomes.”

What efforts have been successful in driving impact? Are initiatives enough, or do we need to shift our internal culture? How do we measure success? Is all ROI created equal?

Speakers:

Reba Dominski, U.S. Bank, EVP, Chief Social Responsibility and President U.S. Bank Foundation
Darlene Goins, Sr. Vice President, Head of Financial Health Philanthropy, Wells Fargo

Moderator: Luke Reynolds, Chief of Outreach and Program Development, FDIC

3:00pm AFTERNOON PLENARY (Centennial Ballroom)

3:00pm **Welcome/Maggie Linton**

3:05pm **“Investing in an Inclusive Economy”**

Steve Boland, Chief Administrative Officer, Bank of America
Aron Levine, President, Preferred and Consumer Banking, Bank of America
Moderator: John Hope Bryant, Founder and CEO, Operation HOPE

3:25pm **“Leading with Purpose: A Conversation with Delta Air Lines CEO Ed Bastian”**

Ed Bastian, Chief Executive Officer, Delta Air Lines

Moderator: John Hope Bryant, Founder and CEO, Operation HOPE

3:45pm **“ALT Finance: Investing in Black Futures”**

Tony Ressler, Executive Chairman, Ares Management and Principal Owner,
Atlanta Hawks

Marcus Shaw, CEO, ALT Finance

Dr. David Thomas, President, Morehouse College

Moderator: Jordyn Holman, Bloomberg

4:10pm **“Taking it to the Suites: Leading Change from the C-Suite”**

Don Cravins, Executive Vice President and Chief Operating Officer, National
Urban League

Chris Womack, Chief Executive Officer, The Southern Company

Moderator: Roland Martin, Journalist, RolandMartin.com

4:35pm **“Maximizing Our Power: Living in Leadership as Women of Color”**

Renee Montgomery, Vice President and Part-Owner, Atlanta Dream

April Ryan, White House Correspondent The Grio

Moderator: Janice Byrant Howroyd, Founder and CEO, ACT-1

5:05pm **Concluding Remarks/Maggie Linton**

THURSDAY, OCTOBER 21st

- 8:45am** **OPENING PLENARY/Centennial Ballroom**
- 8:45am **Welcome/Intro Maggie Linton**
Lance Triggs, President of Operations, Operation HOPE
- 8:50am **“Mega Trends: What Every Leader Needs to Know”**
- Sam Johnson, EY Americas Vice Chair, EY
Moderator: Mark Updegrove, President, LBJ Foundation and ABC News
Presidential Historian
- 9:30am **Keynote: A Conversation with Walmart CEO Doug McMillon**
- Doug McMillon, CEO, Walmart
Moderator: John Hope Bryant, Founder and CEO, Operation HOPE
- 9:55am **“Financial Literacy for All: A Blueprint for Change”**
- Bill Rogers, Chief Executive Officer, Truist*
Moderator: John Hope Bryant, Founder and CEO, Operation HOPE
- 10:15am **“A Business Plan for Banking Inclusion”**
- Bill Daley, Vice Chair of Public Affairs, Wells Fargo
Moderator: John Hope Bryant, Founder and CEO, Operation HOPE
- 10:35am **“Funding Financial Justice: Closing the Racial Wealth Gap”**
- Ned Segal, Chief Financial Officer, Twitter
Moderator: John Hope Bryant, Founder and CEO, Operation HOPE
- 10:55am **“Trust Barometer Special Report: Addressing Racism in America’s Financial System”**
- Lisa Osborne Ross, U.S. Chief Executive Officer, Edelman
Moderated by: Frank Holland, Reporter, CNBC

- 11:15am **“Never Stop Hustling: Athletes After the Game”**
- Reggie Jackson, Baseball Hall of Famer and Founder, Mr. October Foundation
Moderator: John Hope Bryant, Founder and CEO, Operation HOPE
- 11:40am **“Making the Case for Optimism”**
- Joe Gebbia, Co-Founder and Chief Product Officer, Airbnb
Ambassador Andrew Young, Civil Rights Icon and Co-Founder, Greenwood
Moderator: John Hope Bryant, Founder and CEO, Operation HOPE
- 12:05pm **Concluding Remarks/Maggie Linton**