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Joint Mutual Forum

JUNE 28, 2023 • WASHINGTON, DC



FEDERAL DEPOSIT INSURANCE CORPORATION

OFFICE OF THE COMPTROLLER OF THE CURRENCY

FEDERAL RESERVE BANK OF BOSTON

Tuesday, June 27, 2023

5:30 p.m. to 7:00 p.m. Welcome Reception

Wednesday, June 28, 2023

9:00 a.m. Registration

10:00 a.m. Welcome

10:05 a.m. A Conversation with Agency Leaders:

Moderator: **Michael Brickman**, Deputy Comptroller for Specialty Supervision, Office of the Comptroller of the Currency

Speakers: **Travis Hill**, Vice Chairman
Federal Deposit Insurance Corporation

Michael Hsu, Acting Comptroller of the Currency
Office of the Comptroller of the Currency

11:00 a.m. The Future of Mutuality: Looking Forward

Moderator: **Johnny Stanley**, Deputy Comptroller for the East/Northeast Regions, OCC, New York, NY

Panelists: **Clay Adams**, President and CEO
Mascoma Bank, Lebanon, NH

Charles Cummings, President and CEO
Walden Mutual Bank, Concord, NH

Thomas Rudzewick, President and CEO
Maspeth Federal Savings and Loan Association, Maspeth, NY

Program Subject to Change

12:00 noon **Break**

12:15 p.m. **Lunch Session: Economic Outlook & Industry Performance**

Speakers: **Robert DiChiara**, Regional Manager, Division of Insurance and Research,
FDIC, New York, NY

Daniel Grantham, Senior Economist, Banking and Economic Condition,
OCC, Washington, DC

Jeffrey Thompson, Vice President and Economist,
Federal Reserve Bank of Boston, Boston, MA

1:25 p.m. **Risk Management in a Changing Environment**

Moderator: **Marianne Hatheway**, Deputy Regional Director, New York Region, Division of Risk
Management Supervision, FDIC, Braintree, MA

Panelists: **Kevin Allard**, Superintendent of Division of Financial Institutions,
State of Ohio, Columbus, OH

Brian James, Deputy Comptroller for Risk, Resource and Examiner Education,
OCC, Chicago IL

Rae-Ann Miller, Senior Deputy Director, Division of Risk Supervision Management,
FDIC, Washington, DC

Todd Vermilyea, Senior Associate Director, Division of Supervision and Regulation,
Board of Governors of the Federal Reserve System, Washington, DC

2:20 p.m. **Partnerships and Collaboration with Third Parties – a Holistic Approach**

Moderator: **Thomas Lyons**, Associate Director of Risk Management Policy Branch
FDIC, Washington, DC

Panelists: **James Anthony**, President and CEO,
Martha's Vineyard Bank, Edgartown, MA

David Barksdale, President and CEO,
Piedmont Federal Savings Bank, Winston Salem, NC

Ping Yin Chai, President and CEO,
Salem Five Cents Savings Bank, Salem, MA

3:15 p.m. **Break**

3:30 p.m.

Agency Sessions

Federal Deposit Insurance Corporation:

Doreen Eberley, Director, Division of Risk Management Supervision,
FDIC, Washington, DC

Chris Finnegan, Senior Deputy Director, Division of Depositor and Consumer Protection,
FDIC, Washington, DC

Office of the Comptroller of the Currency:

Beverly Cole, Senior Deputy Comptroller for Midsize and Community Bank Supervision,
OCC, Washington DC

Karen Boehler, Deputy Comptroller for the West/Midwest Regions,
OCC, Denver CO

Brian James, Deputy Comptroller for Risk, Resource and Examiner Education,
OCC, Chicago IL

Donna Murphy, Deputy Comptroller for Compliance Risk Policy,
OCC, Washington, DC

Johnny Stanley, Deputy Comptroller for the East/Northeast Regions,
OCC, New York, NY

Terence Mack, Associate Deputy Comptroller, OCC, Dallas, TX

Federal Reserve Bank of Boston and Board of Governors of the Federal Reserve System:

Elizabeth Klee, Senior Associate Director, Board of Governors of the Federal Reserve System,
Washington, DC

Vivian Joel, Lead Financial Institution Policy Analyst, Board of Governors of the Federal Reserve System, Washington, DC

Michael Ravid, Assistant Vice President, Federal Reserve Bank of Boston, Boston, MA

Mary Luvisi, Exam Manager, Federal Reserve Bank of Boston, Boston, MA

4:30 p.m.

Mutual Holding Company Developments

Trevor Feigleson, Senior Counsel,
Board of Governors of the Federal Reserve System, Washington, DC

5:00 p.m.

Adjourn