

# MBA's CRA LENDING WORKSHOP 2026

JUNE 30 | WASHINGTON, D.C.



## CRA Lending Workshop

June 30, 2026

MBA Headquarters | 1919 M Street, NW, Washington, D.C.

### AGENDA

**8:30 AM – 9:00 AM**

**Welcome and Introductions**

**9:00 AM – 10:15 AM**

**CRA in the Current Environment: Federal, State, and What's Ahead**

Gain a clear understanding of today's CRA framework, including current federal rules, enforcement priorities, and emerging developments. Explore the growing role of state-level CRA requirements and how to navigate overlapping expectations with confidence.

**Speakers:**

- William Kooper, MPA, VP, Government Affairs and Industry Relations, Mortgage Bankers Association
- Jeff Naimon, Partner, Orrick
- Bob Niemi, CMB, Director of Government Affairs, Weiner Brodsky Kider PC
- Debbie Sousa, Executive Director, Massachusetts Mortgage Bankers Association

**10:15 AM – 11:15 AM**

**From Compliance to Strategy: Building an Effective CRA Framework**

Examine how to align CRA compliance with business objectives through practical approaches to governance, staffing, and program design. Learn how community needs assessments and regulatory considerations inform a more effective strategy.

**Speakers:**

- Rebecca Escario, Managing Director, CrossCheck Compliance
- Olivia Kelman, Partner, Mitchell Sandler
- Barry Knight, Executive Director, Community Reinvestment Strategy, JP Morgan Chase

**11:15 AM – 12:15 PM**

**Turning Data into Insight: CRA Analytics and Technology in Practice**

Learn practical approaches to managing and leveraging CRA data through tools and processes, from collection and geocoding to analysis and reporting. Explore how institutions are using AI and advanced analytics to inform CRA strategies and identify opportunities.

**Speakers:**

# MBA's CRA LENDING WORKSHOP 2026

JUNE 30 | WASHINGTON, D.C.



- Nora Guerra, SVP, Community Lending Solutions, Guild Mortgage Company
- Jason Keller, Director of Market Strategy, Compliance Analytics, Wolters Kluwer
- Stuart Jones, VP, Enterprise Sales, InGenius Data

## 12:15 PM – 1:30 PM Networking Lunch

### 1:30 PM – 2:30 PM

#### **Expanding Impact: CRA Products, Partnerships, and Outreach Strategies**

Explore how institutions are designing and refining products to better serve target markets while leveraging partnerships and community resources to extend their reach. Gain concrete ideas to strengthen execution and expand the impact of your CRA program.

#### **Speakers:**

- Jim Bopp, VP National Renovation Lending, Planet
- Gabe Ewing del Rio, CMB, AMP, President & CEO, Homeownership Council of America
- Michael Innis-Thompson, Head of Community Development & the Fair Lending Center of Excellence, TD Bank
- Peter Lawrence, Chief Public Policy Officer, Novogradac

### 2:30 PM – 3:30 PM

#### **Solutions in Action: Real-World Strategies That Deliver Results**

Hear how institutions are achieving CRA goals across single-family and multifamily lending, including the role of innovative approaches and community partnerships.

#### **Speakers:**

- Lopa Kolluri, Head of Affordable Lending, CRE, M&T Bank
- Amy Schafflein, Executive Director, United Housing, Inc.
- Anthony Weekly, EVP, Chief CRA & Community Development Officer, Truist
- Wendy Penn, VP, Affordable Housing Initiatives, Mortgage Bankers Association

### 3:30 PM – 4:00 PM

#### **Reflections and Q&A: Applying Today's Insights**

Reflect on key themes from the day, ask outstanding questions, and engage directly with panelists and peers. Share insights and identify practical ways to apply what you've learned within your organization.

### 4:00 PM – 5:00 PM

#### **Networking Reception**