

LATINOS & SOCIETY

 **aspen institute**



**ADVANCING
ECONOMIC
MOBILITY**

VISION, VALUES, AND VENTURE

Monday, December 16, 2024

Lotte New York Palace

New York, NY

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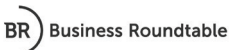
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EVENT INFO

LOTTE PALACE WI-FI NETWORK

Aspen Latinos

PASSWORD

Aspen2024

SPEAKER BIOS

For more information on speakers,
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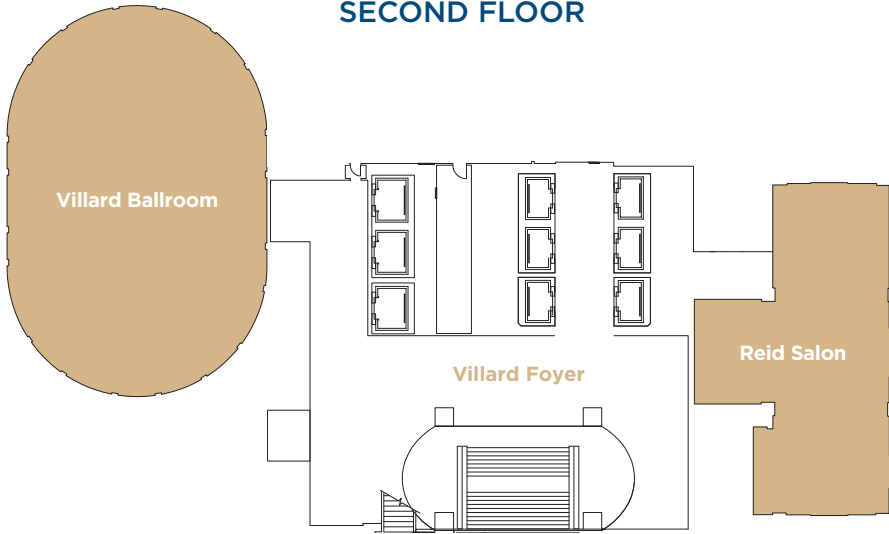
ASPEN LATINOS

To learn more about Aspen Latinos,
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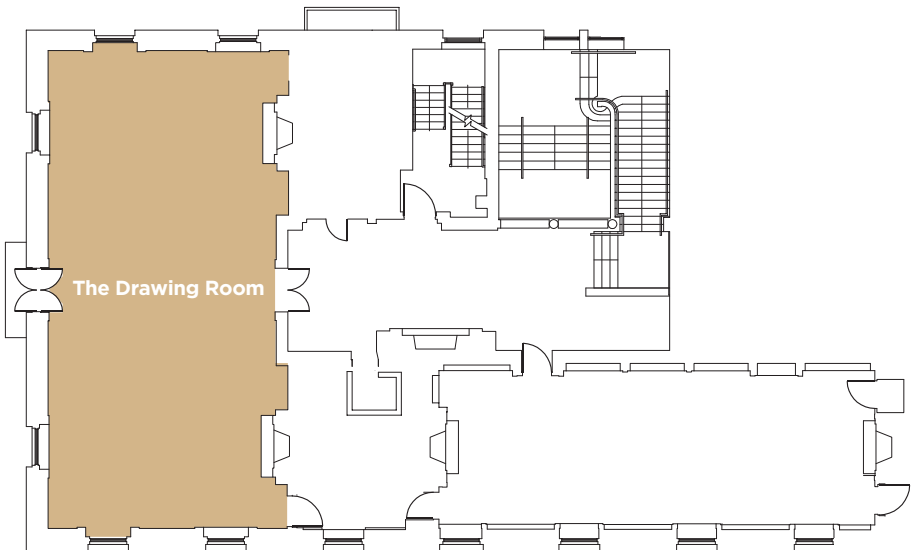


VENUE FLOOR PLAN

SECOND FLOOR



THIRD FLOOR



SCHEDULE-AT-A-GLANCE



- | | |
|----------------------------|---|
| 8:00 AM – 9:00 AM | REGISTRATION AND BREAKFAST
<i>Villard Ballroom Foyer</i> |
| 9:00 AM – 9:30 AM | WELCOME REMARKS
<i>Villard Ballroom</i> |
| 9:30 AM – 10:15 AM | THE ECONOMIC STATE OF LATINOS IN AMERICA: BUILDING UP SMALL BUSINESSES
<i>Villard Ballroom</i> |
| 10:15 AM – 12:10 PM | STRATEGIES FOR EMPOWERING GROWTH AND EQUITY: INNOVATIVE AND RESILIENT FUTURES
<i>Villard Ballroom</i> |
| 12:10 PM – 1:10 PM | NETWORKING LUNCH
<i>Reid Salon</i> |
| 1:10 PM – 2:15 PM | DRIVING OPPORTUNITY AND IMPACT: EDUCATION AND CROSS-SECTOR COLLABORATIONS
<i>Villard Ballroom</i> |
| 2:15 PM – 2:30 PM | COFFEE BREAK
<i>Villard Ballroom Foyer</i> |
| 2:30 PM – 3:00 PM | DIGITAL REMITTANCES IN THE US-MEXICO CORRIDOR: UNLOCKING FINANCIAL INCLUSION
<i>Villard Ballroom</i> |
| 3:00 PM – 3:30 PM | CLOSING REMARKS
<i>Villard Ballroom Foyer</i> |
| 3:30 PM – 5:30 PM | WINE & DESSERT RECEPTION
<i>Reid Salon</i> |

WELCOME

Dear Community:

Happy Holidays, and welcome to New York City for the 4th Annual Aspen Institute Advancing Economic Mobility (AEM) Summit! This year, we gather under the theme Vision, Values, and Venture to explore bold solutions for unlocking Latino economic mobility—a critical driver of America’s prosperity and global leadership.

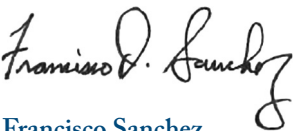
The AEM Summit convenes senior executives, policymakers, and innovators from across sectors to chart a path toward scalable, transformative solutions. Latino workers and entrepreneurs are pivotal to the U.S. economy’s resilience and growth. Yet, systemic barriers—such as limited access to capital, financial services, and knowledge-sharing networks—persist. Breaking these barriers could unlock an additional \$2.3 trillion in economic activity, benefiting every sector of society.

This year’s Summit provides an unparalleled opportunity to engage in transformative dialogue and actionable strategies. We are proud to feature the launch of McKinsey & Company’s latest report, the Economic State of Latinos in America: Building Up Small Businesses. Together, we will examine the systemic changes needed to foster collaboration across sectors, leverage cultural strengths, and build resilient communities prepared for the opportunities and challenges of a rapidly evolving economy.

We extend our deepest gratitude to the Aspen Latinos & Society Advisory Board for their vision and leadership, with special recognition to Lucy Perez, Senior Partner at McKinsey & Company. We also thank our presenting sponsors—Bank of America, Comcast NBCUniversal/Telemundo, and the Hispanic Scholarship Fund—for their unwavering support and commitment to this vital work.

Your vision and leadership are essential to driving meaningful change that ensures an equitable future for all Americans. Thank you for joining us on this journey to catalyze impact that transcends industries, communities, and borders.

We hope you enjoy the Summit, connect with fellow leaders, and get inspired by the innovators on stage!



Francisco Sanchez

*Chair, Aspen Institute Latinos and Society
Advisory Board*



Domenika Lynch

*Executive Director, Aspen Institute Latinos
and Society Program*

AGENDA

WELCOME DINNER

SUNDAY, DECEMBER 15, 2024, 6:00 PM - 9:00 PM

OPENING REMARKS

Aspen Latinos Advisory Board Members:

Nely Galán, *CEO, Galán Entertainment*

Hector Mujica, *Head of Economic Opportunity and Inclusive Technology, Google.org, Americas*

SPONSOR REMARKS

Joanna Diaz Soffer, *Principal Manager, T-Mobile Government & External Affairs, T-Mobile*

J. Reymundo Ocañas, *EVP, Director of Community Development Banking, PNC Bank*

FIRESIDE CHAT: THE CLIMB TO INVESTMENT EXCELLENCE

Ana Marshall, *VP and Chief Investment Officer, William and Flora Hewlett Foundation*

Maria Salamanca, *Partner, Ulu Ventures*

With over 38 years of experience in the financial industry, Ana Marshall will explore key investor traits from her debut book, *The Climb to Investment Excellence*. Informed by evidence and tested in the real world, the book provides an action-oriented blueprint for a resilient and high-performing institutional portfolio and a reliable roadmap for managing complex stakeholder relationships.

In this fireside conversation, Maria Salamanca will interview Ana Marshall on ready-to-deploy strategies and advice to institutional investors, asset allocators, and board members overseeing investment objectives and performance in a volatile and ever-changing market. Essential for both emerging and seasoned investors, the discussion will offer an empowering framework to foster resilience and manage risks in investment strategies.

CLOSING REMARKS

Diego Deleersnyder, *Managing Director, Latinos and Society Program, The Aspen Institute*

AGENDA

8:00 AM – 9:00 AM

BREAKFAST AND REGISTRATION

9:00 AM – 9:30 AM

WELCOME REMARKS

Domenika Lynch, *Executive Director, Latinos & Society Program, The Aspen Institute*

Elliot Gerson, *EVP, Policy Programs and International Partners, The Aspen Institute*

Francisco Sanchez, *Aspen Latinos Advisory Board Chair; Partner, Holland & Knight*

Hon. Isabel Casillas Guzman, *27th Administrator, Small Business Administration*

9:30 AM – 10:15 AM

THE ECONOMIC STATE OF LATINOS IN AMERICA: BUILDING UP SMALL BUSINESSES

Despite comprising 19% of the adult population and initiating 36% of new businesses in 2023, Latinos represent only 6.9% of small business employer firms. Setting the stage for the day, McKinsey & Company Senior Partners and co-authors Lucy Perez and Alberto Chaia will share the latest findings from this year's Latino Economic Mobility report—The Economic State of Latinos in America: Building up Small Businesses.

The report delves into the significant economic contributions and challenges faced by Latino entrepreneurs, and the key to unlocking significant economic growth. Join us to explore the current landscape and opportunities for supporting the growth of Latino-owned businesses.

Alberto Chaia, *Senior Partner, McKinsey & Company*

Lucy Pérez, *Senior Partner, McKinsey & Company*

Moderator: **Robert Barba**, *News Editor, The Wall Street Journal*

AGENDA

(Cont.)

10:15 AM – 10:20 AM

SPOTLIGHT: RAZA DEVELOPMENT FUND

Building Community Wealth

Raza Development Fund (RDF) is the largest Latino-focused and controlled Community Development Financial Institution in the United States. Join us for a spotlight on how RDF lives its mission to unleash the power, potential, and promise of the Latino community through the inspirational story of Julissa Carielo.

Julissa is the co-founder of DreamOn Group, a visionary developer revitalizing the historic westside of San Antonio, TX. As a fellow in RDF's Growing Diverse Housing Developers (GDHD) Program, she is part of an innovative initiative tackling the barriers developers of color face in accessing the capital and networks needed to thrive.

Julissa Carielo, President & Co-founder, DreamOn Group

10:20 AM – 10:50 AM

CATALYZING CAPITAL, CULTURE AND COMMUNITY: FUELING GROWTH AND INNOVATION

Targeted investments are essential for building entrepreneurial ecosystems that advance inclusive wealth and economic growth in underserved communities. But what does this look like in action?

Join a panel of experts as they explore how innovative mentorship, community engagement, and strategic resource allocation are transforming emerging U.S. market segments. Leaders from Gaviña Coffee, Bank of America, and Chingona Ventures will share their bold approaches to expanding economic opportunities and driving sustainable prosperity. Gain valuable insights into how intentional investments are fueling inclusive growth and reshaping the landscape of entrepreneurship.

*Lisette Gaviña Lopez, Chairman of the Board and Managing Director,
Gaviña Coffee Company*

Samara Hernandez, Founding Partner, Chingona Ventures

Jose Tavarez, Bank of America New York City; Vice Chair, Private Bank

Moderator: *Daniela Pierre Bravo, Journalist, Contributor, NBC's "Know Your Value"*

10:50 AM – 11:05 AM

COFFEE BREAK

AGENDA

(Cont.)

11:05 AM – 11:10 AM

SPOTLIGHT: LATINO COMMUNITY FOUNDATION

Unleashing an Economic Renaissance: Philanthropy's Small Business Opportunity

Latinos lead the nation in small business creation and are experiencing the fastest rate of small business development in more than a decade. This is a historic opportunity for philanthropy to tackle the persistent disparities in the small business ecosystem so that Latinos can drive not just a recovery, but an economic renaissance. The Latino Community Foundation is taking a system-level approach that considers the full range of Latino entrepreneurs, from those starting businesses to those seeking multi-million-dollar contracts.

This includes partnerships with community-based organizations to help budding entrepreneurs start businesses, a Latino Capital Accelerator to strengthen the sector of Latino-led CDFIs and expand access to capital, and a California Procurement Playbook to address the challenges and opportunities in government procurement systems so that public sector spending equitably reaches and helps to grow Latino-owned businesses.

Hon. Julián Castro, *CEO, Latino Community Foundation*

11:10 AM – 11:40 AM

STRATEGIES FOR A RESILIENT FUTURE: NAVIGATING DIVERSITY AND EQUITY IN INVESTMENT

Last year's Supreme Court ruling on affirmative action in education led many companies to scale back DEI efforts, threatening progress in diversifying the financial sector. Despite this, demographic shifts continue to reshape the consumer landscape, making it crucial for businesses to adapt and embrace diversity to succeed in the evolving marketplace.

Join us for a discussion that will explore how the investment industry can benefit by reflecting the changing demographics of its clientele. The session will highlight strategies for building inclusive workplaces and investment portfolios while emphasizing the broader impact these initiatives have on creating a more resilient U.S. economy. Learn firsthand how leveraging diversity maximizes economic growth, boosts portfolios, and attracts top talent.

Introductory Speaker: **Carmen McGhee**, *Chief Operating Officer, National Association of Investment Companies (NAIC)*

José E. Feliciano, *Co-Founder and Managing Partner, Clearlake Capital Group*

Hon. Thomas DiNapoli, *54th Comptroller, State of New York*

Moderator: **Stephanie Ruhle**, *Host of 'The 11th Hour' on MSNBC and Senior Business Analyst for NBC News.*

AGENDA

(Cont.)

11:40 AM – 12:10 PM

RIISING TOGETHER: CORPORATE AMERICA DRIVING HISPANIC BUSINESS ENTERPRISE GROWTH

Small businesses are the backbone of America, driving economic growth, creating jobs, and fostering innovation. According to the US Small Business Administration (SBA), they account for 99.9% of all businesses in the United States and employ nearly half of the private-sector workforce.

Corporate initiatives are making a lasting impact on the small business landscape through access to capital, mentorship, technical assistance, and philanthropic endeavors. Join a distinguished session to explore how strategic corporate support can effectively scale minority-owned enterprises and catalyze economic growth.

Introductory Speaker: **Isaac Reyes**, *SVP of Enterprise Risk and Government Affairs, Target*
Ajamu Johnson, *Vice President, Responsible Procurement, Comcast NBCUniversal*
Patty Juarez, *EVP and Head of Hispanic/Latino Affairs Diversity Segments, Representation and Inclusion, Wells Fargo*

Moderator: **Nina Vaca**, *CEO & Chairman, Pinnacle Group*

12:10 PM – 1:10 PM

NETWORKING LUNCH

Hon. Gaddi Vasquez, *Co-host, former Ambassador, United Nations Agencies*

Sponsor Remarks by: **Fidel Vargas**, *President and CEO, Hispanic Scholarship Fund*

1:10 PM – 1:45 PM

FROM CLASSROOM TO BOARDROOM: THE POWER OF EDUCATION

As a more diverse generation of young leaders emerges across various sectors, access to knowledge, networks, and mentorship is essential to sustain and accelerate progress. Recognizing this, the Aspen Institute recently launched the Center for Rising Generations, a visionary initiative to ignite leadership potential and foster civic engagement among young people for years to come.

Educational pathways are powerful catalysts for socioeconomic mobility, unlocking opportunities that uplift individuals and strengthen communities. Join a dynamic conversation on four-year institutions' pivotal role in economic development. We'll explore how these institutions create career pathway systems, inspire innovation, and fuel entrepreneurship within their communities.

Introductory Speaker: **Emilio Gonzalez**, *Executive Director for Public Policy & Strategic Initiatives, Verizon*

Dr. Mildred García, *Chancellor, California State University*

Angel Morales, *Founder and CEO, Morales Capital*

Moderator: **Dan Porterfield**, *President and CEO, The Aspen Institute*

AGENDA

(Cont.)

1:45 PM – 2:15 PM

PUBLIC PRIVATE PARTNERSHIPS: SCALING OPPORTUNITY, SOLUTIONS AND IMPACT

Financial institutions have a unique role to play in equipping communities with the products, services and resources needed to fully meet financial obligations and feel secure in their financial future. This double bottom line approach helps banks run their businesses and serve their customers and communities. While no one business model or industry is the same, one thing is clear—the intersection of core business strategy and community initiatives results in powerful and, oftentimes, historic impact. Join us as we discuss how public-private partnerships are advancing economic opportunity and driving solutions to meet the needs of businesses, nonprofit organizations and the communities they serve.

Marla Bilonick, President & CEO, NALCAB

Horacio Mendez, President & CEO, Woodstock Institute

Andy Navarrete, Head of External Affairs, Capital One

Moderator: Victor Arias, CEO, Encantado Advisors

2:15 PM – 2:30 PM

COFFEE BREAK

2:30 PM – 3:00 PM

DIGITAL REMITTANCES IN THE US-MEXICO CORRIDOR: UNLOCKING FINANCIAL INCLUSION

Remittances—money sent by migrants to relatives in their home countries—serve as a critical lifeline, helping millions of low-income families in developing nations escape extreme poverty and uplifting entire regional and national economies. In 2023, remittances from the US to Mexico reached a staggering \$63 Billion, making it the single largest remittance corridor in the world.

While remittances have positively impacted the well-being of receiving households, still, millions of remittance users remain excluded from formal financial services: the Federal Deposit Insurance Corporation reported that 9.3% of US Latino households remained unbanked in 2021 (doubling the national rate of US unbanked households at 4.5%). In Mexico, the gaps were even more pronounced, with only 49% of adults having at least one account at a financial institution (INAGI, 2021).

AGENDA

(Cont.)

Drawing on insights from Aspen Latinos' debut research project, this panel will explore how people-centered innovation and cross-sector partnerships in the remittance ecosystem can accelerate the financial inclusion of unbanked households in the U.S. and Mexico. Join us for a discussion focusing on the role that policymakers, industry leaders, and community leaders can play in expanding access to financial services and economic opportunities on both sides of the border.

Stefany Bello, *SVP, Digital Partnerships, Fintech and Enablers, Mastercard*

Manuel Godoy, *Co-Founder and CEO, Felix Pago*

Dilip Ratha, *Economic Adviser to the Vice President of Operations, Multilateral Investment Guarantee Agency (MIGA), World Bank Group*

Moderator: **Maria Elena Salinas**, *Independent Journalist*

3:00 PM – 3:30 PM

CLOSING REMARKS

Francisco Sanchez, *Aspen Latinos Advisory Board Chair; Partner, Holland & Knight*

Domenika Lynch, *Executive Director, Latinos & Society Program, The Aspen Institute*

3:30 PM - 5:00 PM

WINE & DESSERT RECEPTION

EVENT CHAIR & CO-HOST



FRANCISCO J. SANCHEZ

*Chair of the Aspen Latinos and Society Advisory Board
Partner, Holland & Knight*

Francisco J. Sánchez is an attorney in Holland & Knight's Tampa office who focuses his practice on trade policy regulation and the Committee on Foreign Investment in the United States (CFIUS) process including mitigation measures. Mr. Sánchez has a long and distinguished career in the public and private sectors.

Mr. Sánchez served as the U.S. Under Secretary of Commerce for Trade until 2013, a role former President Barack Obama nominated him to in 2009. As Under Secretary, Mr. Sánchez led the International Trade Administration (ITA) in its efforts to improve the global business environment by helping U.S. businesses compete abroad. As one of the architects of President Obama's National Export Initiative (NEI), with the goal of doubling U.S. exports by the end of 2014, Mr. Sánchez directed programs and policies that promote and protect the competitiveness of American businesses. Mr. Sanchez also oversaw the ITA's role in the CFIUS.

During the Clinton Administration, Mr. Sánchez served as the assistant secretary for aviation and international affairs at the U.S. Department of Transportation (DOT). Prior to the DOT role, he served in the White House as a special assistant to former President Bill Clinton, and chief of staff to the Special Envoy to the Americas.

Prior to joining Holland & Knight, Mr. Sánchez was the chairman and CEO of CNS Global Advisors, providing strategic advice to companies and governments looking to expand in or resolve issues in foreign markets, including the U.S. Mr. Sánchez also serves as an advisor to a private equity firm concentrating on investment opportunities in the Arctic.

EVENT CO-HOST



AMBASSADOR GADDI VASQUEZ

Former U.S. Ambassador

Former Chair of the Aspen Latinos and Society Advisory Board

Gaddi H. Vasquez has served as senior vice president of government affairs for Edison International and Southern California Edison. He led and managed the company's government relations and legislative activities at the federal and state level, as well as local public affairs.

In 2006, Vasquez was nominated and confirmed by the United States Senate as U.S. Ambassador and permanent representative to United Nations Agencies based in Rome, Italy. From 2002-2006, Ambassador Vasquez served as Director of the United States Peace Corps overseeing volunteers and staff serving in 78 countries. Vasquez has served on the President's Commission on White House Fellowships and has been appointed by three California Governors to state boards and commissions.

He currently serves on the boards of the Public Policy Institute of California, the Segerstrom Center for the Performing Arts, the Orange County Community Foundation, the California State University Foundation Board of Governors, the University of California, Irvine Foundation Board of Trustees, and the Board of Trustees of Chapman University.

Ambassador Vasquez has been awarded the Globe and Anchor Award by the Marine Corps Scholarship Fund and the Tree of Life Award by the Jewish National Fund. In 2014, he was awarded the Ellis Island Medal of Honor and in 2016, he was recognized by the Constitutional Rights Foundation with the organization's Bill of Rights Award. In 2019, he was the recipient of the Pat Brown Institute Global Leadership Award.

He received his Bachelor of Arts degree in public service management from the University of Redlands and has been awarded five honorary doctorate degrees.

ASPEN INSTITUTE LEADERSHIP



DANIEL PORTERFIELD

*President and CEO
The Aspen Institute*

Dan Porterfield is President and CEO of the Aspen Institute, a global nonprofit organization committed to realizing a free, just, and equitable society. A native of Baltimore where he was raised by a single mother, and a Rhodes Scholar, he has been recognized as a visionary strategist, transformational leader, devoted educator, and passionate advocate for justice and opportunity. Dan previously served as President of Franklin & Marshall College, where he led the College in tripling its percentage of incoming low-income students and doubling its population of domestic students of color. He has received numerous awards and recognitions for his work, holds bachelor's degrees from Georgetown and Oxford, and earned his Ph.D. at the CUNY Graduate Center. He is the author of the book Mindset Matters: The Power of College to Activate Lifelong Growth about the growing value of college in today's rapidly changing world.

ASPEN INSTITUTE LEADERSHIP



ELLIOT GERSON

Executive Vice President

Policy and Public Programs, International Partners

The Aspen Institute

Elliot Gerson is the Executive Vice President at The Aspen Institute responsible for its Policy Programs and its International Partners. The Institute's Policy Programs, approximately 30, account for the majority of the Institute's operations and revenue. They foster candid, problem-solving dialogue among leaders and policy experts of diverse views; host leadership fellowships and seminars; range broadly in focus across domestic and foreign policy to the arts, culture, and philosophy; work for impact in communities both nationally and globally; host important public conferences such as the Aspen Security Forum, Aspen Ideas: Health, and Project Play; and offer The Aspen Words Literary Prize. Along with Walter Isaacson and Kitty Boone, Mr. Gerson launched The Aspen Ideas Festival in 2005, and continued to oversee it as well until 2023.

The Institute has 14 International Partners and Initiatives, in Europe, Asia, the Americas and Africa. They work to create a global community of leaders committed to the greater good and elevate non-partisan dialogue to address the world's biggest challenges.

After degrees from Harvard, Oxford and Yale, Mr. Gerson worked as a Supreme Court clerk, practiced law in government and privately, held executive positions in state and federal government, and was president of start-ups in health care and education, and of two leading national insurance and health-care companies. He has served on many non-profit boards, especially in the arts, and is the current Vice Chair of the Service Year Alliance. From 1998 to 2023, he was American Secretary of the Rhodes Trust, administering the 32 annual Rhodes Scholarships allocated to the United States.

ASPEN INSTITUTE LEADERSHIP



DOMENIKA LYNCH

*Executive Director
Latinos & Society Program
The Aspen Institute*

Domenika Lynch is the Executive Director of the Aspen Institute Latinos and Society Program, with the mission of empowering Latino communities and promoting long-term economic growth and resiliency. Over the course of two decades in leadership roles, Lynch has overseen strategic planning, policy advocacy, and public affairs campaigns for nonprofits and corporations, increasing donor and stakeholder support and raising millions of dollars for organizational endowments.

Prior to joining the Aspen Institute, Lynch served as president and CEO of the Congressional Hispanic Caucus Institute, the preeminent Latino Leadership Institute founded by Hispanic members of Congress in Washington, DC. She previously spent more than a decade as executive director of the Latino Alumni Association at the University of Southern California. Her professional breadth extends into the corporate sector, with previous leadership positions at Bank of America and Univision. Lynch currently serves on the Board of Directors of the Congressional Management Foundation, serves on Bank of America's National Community Advisory Council, which advises the bank on community development, environmental, and consumer policy issues, and Toyota North American Diversity Advisory Board. She also serves on the Council on Underserved Communities, which provides the U.S. Small Business Administration with input, advice, and recommendations on strategies to help strengthen competitiveness and sustainability for small businesses in underserved communities and is a Member, Commission on Presidential Scholar. A graduate of the USC Price School of Public Policy, Lynch holds a master's degree from the USC Rossier School of Education. She is the proud parent of her son Jacob, also a USC alumnus.

ASPEN INSTITUTE LEADERSHIP



DIEGO DELEERSNYDER

*Managing Director
Latinos & Society Program
The Aspen Institute*

Diego Deleersnyder is the Managing Director at the Aspen Institute Latinos and Society program, where he leads the Latino Digital Success Initiative. This initiative focuses on enhancing Latino workers and entrepreneurs' preparedness for the 21st-century digital economy. With over a decade of experience in local capacity building, economic development, and urban policy, Diego has worked in the public and non-profit sectors across Latin America, Europe, and the U.S.

At CIPPEC, a leading Latin American think tank, he led research and technical assistance projects on the gig economy, entrepreneurial ecosystems, and metropolitan policy coordination. In Argentina's federal government, Diego spearheaded initiatives to bolster local economic development and capacity building of local governments, including the launch of the National Network of Productive Municipalities, a collaborative platform including over 400 local governments. In London, he served as an international development researcher at the UK Parliament and managed the All-Party Parliamentary Group on Mexico.

Diego holds a Master's in International Affairs from Columbia University, an MSc in Local Economic Development from the London School of Economics, an MSc in Urban Economics from Universidad Torcuato Di Tella, and a BA in Political Science from Universidad de Buenos Aires.

SPEAKERS



VICTOR ARIAS, JR.

Founder and CEO

Encantado Advisors

Victor Arias, Jr. is Founder and CEO of Encantado Advisors, a professional services company focused on executive recruitment of C-Suite executives and corporate board assignments. Additionally, he has a retirement coaching practice. Formerly he was practice leader of the Consumer practice and also the Real Estate practice, and a core member of the Board of Directors practice at Diversified Search. Earlier in his career, Victor served as Senior Client Partner at Korn Ferry and also worked at Heidrick & Struggles and Spencer Stuart.

He has served on various boards including Popeye's Louisiana Kitchen (NASDAQ: PLKI) and retired in 2016 after 15 years. Victor currently serves on the board of the US Hispanic Chamber of Commerce as Chair-elect, the Latino Corporate Directors Association (co-founding board member), The Alumni Society, and the Aspen Institute Latinos & Society board of advisors. Victor is a co-founder and past President of the National Society of Hispanic MBAs (now Prospanica) and served as a member of the Notre Dame Institute of Latino Studies board. Victor served 10 years on the Stanford University Board of Trustees and is a co-founder and current chair of the Latino Business Action Network (LBAN) which is the key collaborator with Stanford University for the Stanford Latino Entrepreneurship Initiative. He is an advisor to various early stage companies and investment firms.

Victor previously served as a White House Fellows Commissioner under appointment by President George W. Bush. Victor earned his BBA from the University of Texas, El Paso, and his MBA is from Stanford University.

SPEAKERS



ROBERT BARBA

News Editor

The Wall Street Journal

Robert Barba is an editor at The Wall Street Journal and helps oversee breaking news coverage. Robert was previously a news editor on the Journal's U.S. News desk and oversaw the real-time team at Dow Jones Newswires. He was also part of the team that produced the Journal's 1921 Tulsa Race Massacre feature, which was a 2022 Pulitzer Prize Finalist and a New York Press Club award winner.

Before joining the Journal, he spent a decade covering banking and fintech for American Banker, joining the publication on the eve of the 2008 financial crisis. He also covered personal finance for Bankrate. In that role, he regularly appeared on television and radio to discuss a variety of personal finance topics.

He is a lifetime member of the National Association of Hispanic Journalists and is a board member of the Society for Advancing Business Editing and Writing. In 2021, he completed the Latino Leadership Institute through the University of Denver.

SPEAKERS



STEFANY BELLO

*SVP, Digital Partnerships, Fintech and Enablers
Mastercard*

Stefany Bello is the Senior Vice President of Digital Partnerships, Retail & Commerce for Mastercard in Latin America and the Caribbean (LAC). In her role, she is responsible for executing Mastercard's digital strategy with digital giants, marketplaces, streaming services, e-commerce software enablers, social media platforms, mobility platforms, fast fashion, gaming, retail, digital wallets, retail, telco, MTOs, travel, CPGs, remittances, and innovative startups. Stefany is responsible for expanding Mastercard's digital footprint, managing relationships with key players, driving innovation and transformational efforts across digital payments in LAC.

Stefany joined Mastercard in 2009, and has held several global leadership roles in Advisors, Prepaid, Financial Inclusion, Debit and Digital. She has been at the forefront of several initiatives driving transformation of the payment's ecosystem. She has played a significant role in the development and commercialization of solutions such as digital/mobile payments, crypto, tokenization and cybersecurity. Stefany also holds a patent for the Mastercard Aid network, an end-to-end, non-financial service designed to streamline aid distribution even in the absence of telecommunications infrastructure.

She serves on the board of CodeArt, a non-profit organization focused on helping young girls in STEM. She is also one of the leads of the Latin American & Caribbean chapter of "The Belle Block", a Mastercard led community focused on educating and empowering women and non-binary individuals to benefit from Web3 technology and crypto. Additionally, she serves on the advisory board of a loyalty start up, Reworth.

Stefany holds a bachelor's degree from Manhattanville College in international business management with concentrations in Latin American studies and Finance. Additionally, she is fluent in English, Spanish, Italian, and proficient in French.

SPEAKERS



MARLA BILONICK

President & CEO

NALCAB

Marla Bilonick is NALCAB's President & CEO and serves as CEO of NALCAB's subsidiary asset management company Escalera Community Investments. Prior to joining NALCAB, she served as the CEO of the Latino Economic Development Center in Washington, DC.

Before her tenure at LEDC, Marla worked for DAI, managing multimillion-dollar international development contracts funded by USAID and other agencies. Prior, she served as the director of the Upper Manhattan Business Solutions Center in Harlem.

Marla was appointed by President Biden to serve on the Department of Treasury's CDFI Fund Community Development Advisory Board and is the first and only Latina/Latino to be elected Chair of the Board. Marla is a board member of Self Help Ventures Fund, Justice Climate Fund, and Latino Prosperity and sits on the FDIC's Committee for Economic Inclusion. She is a former Aspen Institute Emerging Leaders in Microbusiness-ELM2 Fellow, and a graduate of the Citi/ OFN Leadership Program for Opportunity Finance at The Wharton School of the University of Pennsylvania. Marla serves on Capital One, PNC, and TD Bank's respective Community Advisory Councils and was an advisor to Wells Fargo's regional "Where We Live" initiative. She was named a Community Champion for the Washington, DC metropolitan area by Capital One Bank in 2015.

Marla is a graduate of the University of Wisconsin at Madison with a BA in Political Science, and she received her MA in International Economics and Latin American Studies from the Johns Hopkins University School of Advanced International Studies.

SPEAKERS



JULISSA CARIELO
President and Co-founder
DreamOn Group

Julissa's drive to transform dreams into reality through DreamOn Group, her real estate development, construction, and property management companies, is evident in her thoughtful approach. As President, she develops, constructs, and manages properties that bring economic, environmental, and cultural value to communities. Her work with governmental agencies, non-profits, and cultural organizations aims to create opportunities and foster change.

Julissa's journey in the construction industry began from the ground up, gaining over 30 years of experience in Design-Build construction. She founded her first company, Tejas Premier Building Contractor, Inc., using her 401k savings. Today, it stands as a principal contractor in the State of Texas. She is a dedicated leader focused on opportunity and equity advancement.

In 2015, she transformed an unused elementary school into the Maestro Entrepreneur Center in San Antonio's poorest zip code. This 501c3 center incubates over 40 small businesses and assists over 600 businesses annually with accelerated training.

Julissa's commitment to improving San Antonio is a fundamental focus. She co-led the Economic Transition Team during COVID-19 at the Mayor's invitation, helping develop plans for local businesses to reopen safely. Julissa co-created a playbook used by many companies to resume operations.

Known for her expertise in uniting community partners, Julissa collaborates with County and City leadership to develop funding mechanisms for community initiatives. She has extensive experience working with non-profits to build programs and spaces that serve the community. Julissa is a trusted leader, working with small businesses and organizations to activate programs that serve and benefit all.

SPEAKERS



HON. ISABEL CASILLAS GUZMAN

27th Administrator

U.S. Small Business Administration

Isabel Casillas Guzman is the 27th Administrator of the U.S. Small Business Administration and serves in President Biden's Cabinet as the voice for America's more than 33 million small businesses and innovative startups.

Guzman is a lifelong advocate, entrepreneur, advisor to founders, and leading government innovator on entrepreneurship. Under Guzman's leadership, the SBA manages a \$500 billion portfolio and supports over \$50 billion in funding annually to America's small businesses, innovators and disaster impacted communities. She instituted the most sweeping reforms in the Agency's history, expanding access to capital for historically underserved communities and scaling the agency to help more businesses start, grow, and be resilient. By making the SBA more equitable than ever, Guzman positioned the Agency to support the historic Biden-Harris small business boom that made the nation's post-pandemic recovery the fastest and strongest in the world.

SPEAKERS



JULIÁN CASTRO

CEO

Latino Community Foundation

Julián Castro serves as Chief Executive Officer of the Latino Community Foundation, the nation's largest Latino-serving foundation.

Julián's deep commitment to the future of this nation is woven into his DNA. Raised by his mother Rosie Castro, a civil rights and Chicana activist, and his grandmother, Victoria Castro, on the westside of San Antonio, Texas, Julian grew up with a profound understanding of what it meant to love and serve community. Inspired by a legacy of leaders working to safeguard our democracy and strengthen community, Julian has dedicated his life to public service.

SPEAKERS



ALBERTO CHAIA

Senior Partner

McKinsey & Company

Alberto has deep experience in financial inclusion. In 1995, he served in the Ministry of Finance for Mexico as the program leader for establishing rural banks. Since joining McKinsey in 2002, he has led economic development and financial inclusion projects in the Americas, EMEA and Asia.

Recently, Alberto's focus has been on helping clients to develop low-income banking and microfinance programs. These have included: creating financial services centers across one of the largest retail chains in Latin America; identifying potential customers for a large development bank in Mexico—with the aim of marketing products tailored to their credit needs; and reviewing strategy and operations at two of the largest mortgage banks in Mexico, with the goal of increasing their reach into low-income communities.

In addition to his work in economic development and financial inclusion, Alberto works extensively in the education sector. Recent projects include helping a foundation define an intervention strategy to support gifted students, working with an academic medical center to develop its vision for the future, and assisting a major Latin American university define its strategy for distance learning.

Alberto serves as an adviser to the Financial Access Initiative (FAI), which supports development economists focused on expanding access to quality financial services for low-income individuals. He also sits on the board of two foundations in Mexico focused on improving education and nutrition among the disadvantaged.

SPEAKERS



JOANNA DIAZ SOFFER

*Principal Manager, T-Mobile Government & External Affairs
T-Mobile*

Joanna Diaz Soffer is the Principal Manager at T-Mobile Government & External Affairs. In her current role she works with internal and external stakeholder organizations, advocating in the public policy space for T-Mobile priorities. She also drives visibility of T-Mobile in the marketplace and its good citizenship with government leaders, diverse organizations, and a variety of external constituencies.

Joanna joined T-Mobile in 2020 after working as a consultant on the historic T-Mobile-Sprint merger. Previously in her role as Associate Vice President at DDC Public Affairs, Joanna worked with clients like T-Mobile to plan and execute their advocacy and policy initiatives. She served clients in the energy, telecommunications, and manufacturing industries. Joanna has utilized her over-a-decade in politics and corporate government relations experience to build and manage successful issue and advocacy campaigns.

Prior to joining DDC Public Affairs in 2017, Joanna served as the Deputy Campaign Manager for a top targeted congressional race in Nevada. Most notably, she served as the Nevada Hispanic Engagement Director for Jeb Bush for President in the 2016 cycle. Originally from Southern California, Joanna worked for Disneyland Resort Government Relations and various state and local political campaigns.

Currently, Joanna serves on the National YMCA Board, The Latino Coalition Board, Congressional Hispanic Leadership Institute (CHLI) Advisory Council, the OCA-Asian Pacific American Advocations Business Advisory Council and The Congressional Hispanic Leadership Institute Advisory Council. Joanna resides in Northern Virginia with her husband and two daughters.

SPEAKERS



THOMAS DINAPOLI

*54th Comptroller
State of New York*

Thomas P. DiNapoli is the 54th Comptroller of the State of New York. A life-long Long Islander, he was raised in a middle-class, union household and saw the value of hard work and stretching every dollar in the example set by his parents.

Under his leadership, the \$274.6 billion New York State Common Retirement Fund is one of the best-managed public pension funds in the nation with a funded ratio of 93.2 percent.

State Comptroller DiNapoli believes in making government accountable to the people and has earned praise for his early warning system that identifies local governments and school districts in fiscal stress.

In 1972, he won his first election and served as a trustee on the Mineola Board of Education, becoming the first 18-year-old in New York State to hold public office. He attended Hofstra University, earning a bachelor's degree in history and graduated magna cum laude in 1976. State Comptroller DiNapoli worked in the telecommunications industry for 10 years and attended night classes to earn his master's degree from The New School University's Graduate School of Management and Urban Professions.

In 1986, he ran for the New York State Assembly and was elected to represent the 16th District in northwestern Nassau County for the next 20 years. He was elected State Comptroller on February 7, 2007, by a bipartisan majority of the State Legislature. He was elected Comptroller by New York's voters in 2010, 2014, 2018 and 2022.

SPEAKERS



JOSÉ E. FELICIANO

*Co-Founder and Managing Partner
Clearlake Capital Group*

José E. Feliciano is Co-Founder and Managing Partner of Clearlake Capital Group, L.P., a private investment firm founded in 2006. In addition to his investing responsibilities, Mr. Feliciano is responsible for the day-to-day management of the firm. With a sector-focused approach, the firm seeks to partner with world-class management teams by providing patient, long-term capital to dynamic businesses that can benefit from Clearlake's operational improvement approach, O.P.S.® The firm's core target sectors are technology, industrials, and consumer. Clearlake has over \$50 billion of assets under management and its senior investment principals have led or co-led over 300 investments. Prior to co-founding Clearlake, Mr. Feliciano was a Partner and member of the investment committee at Tennenbaum Capital Partners, a senior executive at govWorks, Inc., and started his career in investment banking in the Mergers & Acquisitions and Corporate Finance Groups at Goldman, Sachs & Co.

Mr. Feliciano currently serves on the Board of Directors of several Clearlake portfolio companies. He co-founded the SUPERCHARGED Initiative, philanthropic grantmaking, and impact investment organization, in 2014. The Initiative invests in both nonprofits and for-profit ventures that are compatible with its goal to make a lasting impact across four key priorities: Education, Entrepreneurship, Equal Opportunity, and Empowerment. In addition, Mr. Feliciano serves on the board of directors of the Robert Toigo Foundation, a non-profit organization dedicated to fostering the career advancement and increased leadership of underrepresented talent, and Robert F. Kennedy Human Rights, a foundation that works to support individuals, alliances, and organizations dedicated to improving human rights around the world. He is also a trustee of Stanford University and the Smithsonian's National Museum of the American Latino.

Mr. Feliciano graduated with High Honors from Princeton University, where he received a B.S. in Mechanical & Aerospace Engineering. He received his M.B.A. from the Graduate School of Business at Stanford University.

SPEAKERS



NELY GALÁN

*Media Entrepreneur, New York Times Bestselling Author,
CEO Galán Entertainment*

Nely Galán is a self-made media entrepreneur. Dubbed the Tropical Tycoon by the New York Times Magazine, she was the first Latina President of a U.S. television network (Telemundo). She is an Emmy Award-winning producer of over 700 episodes of television in Spanish and English, including the hit reality series, THE SWAN. Galan is also the author of The New York Times bestselling book SELF MADE, Becoming Empowered, Self-Reliant, and Rich in Every Way (2016) Random House, about the revolution in women's entrepreneurship led by multi-cultural women in the US and emerging women around the world. Galán holds a Masters and Doctorate in Clinical Psychology, with an emphasis on the psychology of money in multicultural communities. Her new Podcast is MONEYSMAKER with Nely Galan, and her new book co-authored with Julio Gonzalez, Why Billionaires Love Taxes: How to follow the IRS' Lead to Build Wealth, drops in November. Galan is devoted to creating financial literacy and wealth building in communities of color.

SPEAKERS



DR. MILDRED GARCÍA
Chancellor
California State University

Dr. Mildred García began her tenure as the California State University's 11th chancellor on October 1, 2023. She is the first-ever Latina to lead the nation's largest and most diverse four-year public university system.

The appointment marks a return to the CSU for Dr. García, who served as president of Cal State Fullerton from 2012 to 2018 and president of CSU Dominguez Hills from 2007 to 2012.

Prior to her appointment as chancellor, Dr. García served as president of the American Association of State Colleges and Universities since 2018, where she was an internationally renowned advocate for public higher education.

Dr. García previously served as CEO of Berkeley College and has held academic and leadership positions at Arizona State University; Montclair State University; Pennsylvania State University; Teachers College, Columbia University; and the Hostos, LaGuardia and City Colleges of the City University of New York.

A recipient of myriad awards and honors, Dr. García was appointed by President Barack Obama to serve on the President's Advisory Commission on Educational Excellence for Hispanics and has been named to the American Academy of Arts and Sciences.

Raised in New York City, Dr. Garcia is a first-generation college student and the first in her family to earn a degree, she received her associate degree from New York City Community College, a bachelor's in business education from Baruch College and a master's in business education from New York University. At Teachers College, Columbia University, she earned a master's and a doctorate in higher education administration.

SPEAKERS



LISETTE GAVIÑA LOPEZ

*Chairman of the Board and Managing Director
Gaviña Coffee Company*

Lisette Gaviña Lopez is a fourth-generation coffee roaster proudly continuing the rich legacy of the Gaviña family, owners of F. Gaviña & Sons, Inc also known as Gaviña Coffee Company.

Established in Vernon, California in 1967, Gaviña Coffee Company is one of the largest family-owned coffee companies in America and the nation's largest privately held minority-owned coffee roaster. The family's unmatched coffee experience, as coffee growers and roasters, dates back 150 years to the rich coffee-bearing soil of Cuba.

Lisette serves as Chairman of the Board and Managing Director overseeing Sales and Marketing for the company's brands including Don Francisco's Coffee, Café La Llave Espresso, Gaviña Gourmet Coffee and Jose's Gourmet Coffee. Her team develops and launches new products including the most recent launch of Don Francisco's and Café La Llave aluminum Nespresso-compatible capsules, and manages business relationships in the Grocery, e-Commerce, Club and Foodservice channels including Costco, Wal-Mart, Amazon and McDonalds USA.

With more than 15 years in the coffee industry and a lifetime of experience in coffee, Lisette is also a Q grader, the wine sommelier equivalent to the coffee industry.

Born and raised in Los Angeles, Lisette holds a Bachelor's and Master's degree in Business Administration from the University of Southern California and is a graduate of the USC Food Industry Management Executive Program. Lisette lives in Pasadena, California with her husband and their 11 year old son.

SPEAKERS



MANUEL GODOY

Co-founder & CEO

Félix Pago

Manuel is the co-founder & CEO of Félix Pago, a chat-based platform for Latinos in the US to send money abroad. He is a tech enthusiast focusing on how tech can positively impact the lives of people. By leveraging AI for conversational bots and Blockchain for money transfer, the Felix Pago team has developed the next frontier in cross-border payments. Manuel received an electrical engineering bachelors and masters degree from Caltech, an MBA from The Wharton School.

SPEAKERS



EMILIO GONZALEZ

*Executive Director for Public Policy & Strategic Initiatives
Verizon*

Emilio Gonzalez is the Executive Director for Public Policy & Strategic Initiatives at Verizon where he manages a wide-ranging external affairs portfolio and leads several internal strategic initiatives.

Emilio is a first-generation immigrant, a graduate of Harvard University and lives in Washington, D.C. with his wife and daughters.

Emilio joined Verizon in 2004 as Director for Hispanic and Asian American Affairs. For almost three decades, Emilio has been an active supporter and advisor to several leading civil rights policy organizations.

Among his recognitions Emilio and Verizon have received the Courage Award from the Asian American Justice Center (AAJC), the Corporate Advocate of the Year from Asian Pacific American Institute for Congressional Studies (APAICS), Business Advocate of the Year from the US Hispanic Chamber of Commerce and a Lifetime Achievement Awards from the Mexican American Legal & Education Defense Fund (MALDEF).

Prior to joining Verizon, Emilio was an appointee in the Clinton Administration focusing on technology and Internet policy issues. As Technology Advisor to the U.S. Secretary of Education, Emilio helped design, develop and implement the E-rate program which is the single largest federal investment in educational technology to date.

Before joining the Administration, Emilio served as Senior Analyst at the U.S. Congress Office of Technology Assessment (OTA) where he advised standing committees of Congress on tech issues and co-authored Making Government Work.

His Committee and Board memberships include AAJC, MALDEF, the Congressional Hispanic Leadership Institute (CHLI), and the National Association of Latino Elected and Appointed Officials (NALEO).

SPEAKERS



SAMARA HERNANDEZ

*Founding Partner
Chingona Ventures*

Samara is the Founding Partner of an institutionally backed pre-seed stage fund, Chingona Ventures, focusing on investing in tech and tech-enabled companies across the U.S. The fund has \$60MM in AUM and has made over 40 investments across technology sectors in Financial, Food, Future of Work and Learning, and Health/Wellness. Before this, she was an investor at MATH Venture Partners across two funds where she led new investment review, diligence, and execution. Samara started her career at Goldman Sachs, where she was continually ranked top 5 in selling financial products, providing market insights, advising on portfolio construction, and consulting business practices. Her career started in the Fixed Income, Currency, and Commodity (FICC) group where she led multiple tech-enhancing projects across global exchanges. She is on the advisory boards for Coolwater, an organization to support the emerging manager community; Angeles Investors, an organization investing in early-stage startups led by Latinx founders; and Venture Forward, a non-profit working to get more diversity in the venture capital ecosystem.

Samara earned an Industrial and Operations Engineering degree from the University of Michigan and a master's degree in Business Administration from Northwestern University.

SPEAKERS



AJAMU M. JOHNSON

*Vice President, Responsible Procurement
Comcast Corporation*

As Vice President of Procurement for Comcast, Ajamu leads an enterprise-wide team focused on responsible sourcing activities for one of the world's leading providers of media and entertainment. His group is responsible for establishing corporate policy, strategy, and objectives to maximize supplier inclusion and sustainability with Comcast's (including NBCUniversal and Sky) vendor partners. The activities led by his team helped Comcast & NBCUniversal cultivate more than \$35 billion in contracting activity with diverse suppliers and small businesses during the past decade.

After consecutive years of economic impact growth, Comcast became the first media and technology company inducted into the prestigious Billion Dollar Roundtable.

Mr. Johnson earned a degree in Commerce and Engineering from Drexel University; and was named to Drexel's inaugural 40 Under 40 list. He is a graduate of UCLA's Executive Leadership Development Program and the Leadership Philadelphia CORE Program. Additionally, he received the Trailblazer Award from the National Association of Multi-Ethnicity in Communications (NAMIC). He is a member of Drexel's President's Leadership Council, and currently serves on the board of directors for the Women's Business Enterprise National Council (WBENC), the Billion Dollar Roundtable (Treasurer) and the Central Philadelphia Development Corporation.

SPEAKERS



PATTY JUAREZ

*EVP and Head of Hispanic/Latino Affairs Diversity Segments,
Representation and Inclusion
Wells Fargo & Company*

Patty Juarez has spent more than 29 years at Wells Fargo where she has held a variety of leadership roles. Currently, Patty serves as the Head of Hispanic/Latino affairs. She is responsible for building a Hispanic/Latino external engagement portfolio focused on national cultural engagement, executive recruitment, business development, and stakeholder relations. She partners with Diverse Segments Representation & Inclusion, External Engagement, and Government Relations to curate national and local stakeholder activities to amplify Wells Fargo's DE&I commitment.

Patty has a long history of leadership in the Latino community. She is former chairwoman and current board member of the Orange County Hispanic Chamber, she is on the board of the United States Hispanic Chamber of Commerce, the Hispanic Scholarship Fund, and on the advisory board for the Latino Donor Collaborative. She is also on the board of Governors at Chapman University and on the Chancellor's Council at the University of California, Berkeley. Patty is also involved in diversity and entrepreneurship initiatives at Cal, Stanford, and Harvard Universities.

Externally, Patty often speaks about topics such as Diversity and Inclusion, diverse segments, access to capital, multi-cultural marketing, and financial literacy. Internally, Patty is past president of the Hispanic & Latino Connection Employee Resource Network, which has 53 chapters and represents more than 35,000 Latinos at Wells Fargo. Patty lives in Orange County, California, with her children Isabella and Max.

SPEAKERS



ANA MARSHALL

*Vice President & Chief Investment Officer
William and Flora Hewlett Foundation*

Ana Marshall, CFA, brings 38 years of investment experience as an investor and allocator to her role as Vice President & Chief Investment Officer for the William and Flora Hewlett Foundation's \$13 billion portfolio. Ana has served on Hewlett's investment team for 20 years and as CIO for the past 13 years. She is responsible for asset allocation, investment strategy, portfolio construction, and risk management. Prior to becoming CIO, Ana led the selection and oversight of external managers in global equities, distress/credit, fixed income, and hedged strategies since joining the foundation in 2004.

Prior to her role at Hewlett, Ana spent 18 years as an investor. Her portfolio manager responsibilities spanned global and emerging market equities, as well as distress/credit and emerging market debt at RCM Capital Management, Bank of America, and Caywood-Scholl Capital Management.

Ana graduated Magna Cum Laude from University of San Diego in Economics and earned her Chartered Financial Analyst. She was born and raised in Mexico and is fluent in Spanish. She serves as a Board Trustee of the Children's Investment Fund Foundation (CIFF), an advisor to PIMCO, as well as on the Investment Committee of the Skoll Foundation. She previously served as an advisor to Bayshore Global and the U.S. Soccer Federation. Ana teaches asset allocation and portfolio management at Stanford Graduate School of Business and is also a member of the Council on Foreign Relations.

SPEAKERS



CARMEN MCGHEE

Chief Operating Officer

National Association of Investment Companies (NAIC)

Carmen McGhee is the Chief Operating Officer of the National Association of Investment Companies (NAIC), the trade association and largest network of diverse-owned alternative investment funds. The NAIC's membership includes more than 180 members managing over \$430 billion in institutional capital. As COO, Carmen provides strategic oversight over all of NAIC's operations, membership, marketing, programs and initiatives. She serves on the UVA Alumni Association Board of Managers and is Chair of the Governance & Nominating Committee for Communities In Schools' national board of directors. Additionally, she is a member of the Loudoun County Economic Development Authority, the MBA Fund I Investment Committee, and the Hispanics in Philanthropy Inicio Ventures Advisory Cabinet.

SPEAKERS



HORACIO F. MENDEZ

*President & CEO
Woodstock Institute*

Horacio Méndez is President and CEO of the Woodstock Institute, a nationally recognized non-profit research and policy institute focusing on financial systems reform. Horacio was most recently a Managing Director in the Americas for the Mitsubishi UFJ Financial Group (MUFG) and the Chief Sustainability Officer for Dutch-based agricultural lender, Rabobank. He has also served as a Senior Fellow at the Aspen Institute, a Director for Silicon Valley Bank, spent 10 years at the Federal Reserve, and began his career on the equity options floor in San Francisco and running the fixed income desk for Continental Savings. In four years at Woodstock Institute, he effectively shut down the predatory lending industry in Illinois, expanded state consumer financial protection laws to include credit unions and mortgage companies, and helped to negotiate what will be the largest Community Benefits Agreement in US history. He serves on the board of Housing Action Illinois, Allies for Community Business (IL) and Prosperity Now, and is the Board Chair of the California Association for Micro Enterprise Opportunity (CAMEO). He has two degrees in Economics from Santa Clara University and San Jose State University, attended the California Culinary Academy and bartended in San Francisco for 5 years... a skillset he has found particularly useful as a non-profit leader. He lives in Oak Park, IL with his wife Nicole and two boys, Alejandro and Santiago. (Dale Dale Boca).

SPEAKERS



ANGEL MORALES

Founder and CEO

Morales Capital

Mr. Morales is Founder and CEO of Morales Capital, a single-family office with a focus on private equity opportunities in mission-oriented companies. He has over 25 years of private equity experience and was formerly the co-head of BAML Capital Partners, Bank of America Merrill Lynch's private equity group. Mr. Morales was a member of the founding team that helped grow the platform into a leading global private equity firm with over \$6 billion of assets under management, seven offices around the globe and more than 80 professionals. Mr. Morales has deep finance, governance and corporate strategy experience as a Board member of leading publicly traded companies with national and global footprints.

SPEAKERS



HECTOR MUJICA

*Head of Economic Opportunity and Inclusive Technology
Google.org, Americas*

Hector Mujica leads economic opportunity and inclusive technology efforts at Google.org—Google’s philanthropy—across the Americas. Within his role, he looks after a \$100M+ investment portfolio that supports interventions which aim to provide pathways to digital economy jobs for individuals with multiple barriers to employment, as well as ensuring that emerging technologies like Artificial Intelligence benefit people across society equitably. Hector also serves on Google’s Latino Leadership Council, where he helps to steward Google’s social impact initiatives with the Latino community.

Hector has spent the last decade advancing social justice through philanthropy and public policy. Prior to Google, Hector’s experience ranged from investment banking at Oppenheimer Holdings, domestic policy at the Office of Congresswoman Debbie Wasserman Schultz, and international development at the U.S. Department of State.

Hector holds a Bachelor of Arts in International Business from Florida International University, a Professional Certificate in Social Entrepreneurship from the Stanford Graduate School of Business, and a Master of Public Affairs from the Goldman School of Public Policy, University of California, Berkeley. Outside of work, Hector has been recognized as a Young Global Leader through the World Economic Forum, a German Marshall Fellow, and serves on the Board of Directors of Hispanics in Philanthropy, the Hispanic Federation, and several advisory boards, including Aspen Institute’s Latinos and Society, WorkingNation and Inicio Ventures. Hector currently resides in South Florida.

SPEAKERS



ANDY NAVARRETE

*EVP, Head of External Affairs
Capital One Financial Corporation*

Andy Navarrete is Executive Vice President, Head of External Affairs, for Capital One Financial Corporation. External Affairs includes Capital One's Government and Policy Affairs Group, Regulatory Relations, Community Impact and Investment, Corporate Communications, Community Finance, CRA Strategy, and External Affairs Strategy and Engagement teams. Mr. Navarrete oversees Capital One's strategic and supervisory engagements with federal and state regulatory agencies and legislators, enterprise communications and public relations, and the Company's engagement in the communities that we serve. He serves as Chair of the Capital One Foundation, and as the Accountable Executive for ¡Hola!, a resource group supporting the development and recruitment of Hispanic and Latinx associates.

Mr. Navarrete joined Capital One in 1999 and served as Chief Counsel for each of the Company's major business units. He also led the Legal Department's team of corporate and consumer bank regulatory attorneys, its Legal Management team and served as Assistant Corporate Secretary.

Prior to joining Capital One, Mr. Navarrete was an attorney with the law firm of Morgan Lewis. Mr. Navarrete began his legal career in the International Section of the Legal Division of the Federal Reserve Board. Prior to law school, Mr. Navarrete worked for the House Banking Committee and as a federal relations specialist for APCO Associates.

Mr. Navarrete serves as an Adjunct Professor at Georgetown University Law School. He is also a member of the Consumer Financial Protection Bureau's Consumer Advisory Board. He received his J.D. from Boston College and undergraduate degree from the College of William and Mary.

SPEAKERS



J. REYMUNDO OCAÑAS

*EVP, Director of Community Development Banking
PNC Bank*

At PNC, Mr. Ocañas is responsible for the team dedicated to improving low- and moderate-income communities across the bank's footprint using innovative financial transactions, the delivery of programs supporting families and neighborhoods and through strategic grantmaking coast to coast.

He leads the teams producing CRA-eligible community development lending and investment across PNC markets, with a primary focus on commercial and residential real estate, community development, financial institutions and opportunity zone financing.

Mr. Ocañas is responsible for the launch and delivery of PNC's \$88 Billion Community Benefits Plan announced March 2021 that will provide \$47 billion in residential mortgage and home equity loans; \$26.5 billion in loans to small businesses; \$14.5 billion in community development loans, including at least \$400 million for community development financial institutions; and \$500 million in charitable giving, sponsorships and philanthropic grants. This Plan also includes a \$1.5 Billion commitment to address systemic racism through the deployment of capital and programs that provide economic opportunity for communities of color across the U.S.

Before joining the bank in 2009, Ocañas held positions with BBVA (merged with PNC), Wells Fargo, JPMorgan Chase & Co., Bank of America, the Texas Association of Community Development Corporations and the Greater Austin Hispanic Chamber of Commerce.

SPEAKERS



LUCY PÉREZ

Senior Partner

McKinsey & Company

Lucy Pérez is a Senior Partner at McKinsey & Company's Boston office, advising CEOs and teams at leading organizations globally on growth strategy, innovation, sustainability, and organizational transformation. Lucy is especially passionate about advancements in science and technology, which are transforming patient care delivery and outcomes.

Lucy is a coleader of the McKinsey Health Institute and has spearheaded multiple partnerships to advance health equity, including a collaboration with the World Economic Forum to assess the economic impact of investing in women's health. This seminal research led to Lucy receiving the 2024 Presidential Award from the American Medical Women's Association.

Lucy is the sponsor of McKinsey's Hispanic Latino Network which includes more than 1000 colleagues and co-leads the research collaboration with the Aspen Institute Latinos in Society on Latino economic mobility. She is also the sponsor of McKinsey's Hispanic Leadership Academy which has seen over 20,000 Latino leaders from organizations across the country graduate to date.

Beyond her work at McKinsey, Lucy is a board member of the Massachusetts Business Roundtable and sits on the advisory board for the Aspen Institute's Latinos in Society program and the Women's Health Innovation Summit. Lucy was elected one of Amplify LatinX's inaugural LatinX 100 Leaders and named one of ALPFA's 50 Most Powerful Latinas in 2023. She was also the recipient of one of the 2024 Pinnacle Awards from the Greater Boston Chamber of Commerce for her Achievement in the Professions.

Lucy holds a bachelor's degree and doctorate degree in Chemistry from Harvard University. She is an avid traveler, amateur photographer, and a co-inventor on multiple patents.

SPEAKERS



DANIELA PIERRE BRAVO

Journalist, Contributor
NBC's "Know Your Value"

Daniela Pierre-Bravo is a bilingual journalist, best-selling author, and contributor for NBC's "Know Your Value" platform. A former on-air reporter for MSNBC's "Morning Joe" and Cosmopolitan magazine columnist, Pierre-Bravo has focused her reporting on underrepresented communities, immigration, Latinos in the US, and women's rights. She's also written on career, mental health, and financial wellness with an emphasis on women of color. Her work has been featured on the Today Show, CBS Mornings, Amazon Prime Video, Telemundo, NBC News Now, Forbes, Cosmopolitan, Refinery29, New York Magazine, and more.

She is the co-author of "Earn It" alongside Morning Joe co-host Mika Brzezinski. Her first solo book, "The Other: How to Own Your Power at Work as a Woman of Color" was published in 2022. She is also the founder of Acceso Community — a mentorship and educational platform for professional women.

SPEAKERS



DILIP RATHA

*Economic Adviser to the Vice President of Operations,
Multilateral Investment Guarantee Agency (MIGA)
World Bank Group*

His TED talk on remittances, with almost 1.5 million views, has inspired many fintech start-ups. He is the Founder of KNOMAD, the Migrating out of Poverty Research Program Consortium, and the African Institute of Remittances. Considered a global expert on remittances and innovative financing, he has published pioneering papers on migration, diaspora bonds, future-flow securitization, predicting sovereign ratings, and South-South FDI. In 2016 he was the inaugural senior visiting fellow at Harvard South Asia Institute and during 2011-2013, a visiting professor of economics at the University of Sussex. Prior to joining the World Bank, Dilip was an Asia Regional Economist at Credit Agricole Indosuez W.I. Carr Securities (Hong Kong and Singapore). Prior to that, he was an Assistant Professor (macroeconomics) at the Indian Institute of Management Ahmedabad.

Dilip has a Ph.D. in economics from Indian Statistical Institute and is frequently cited in major media channels worldwide.

SPEAKERS



ISAAC REYES

*Senior Vice President of Enterprise Risk and Government Affairs
Target*

Isaac is the Senior Vice President of Enterprise Risk and Government Affairs for Target Corporation. He leads reputation issues, incidents and crises response and oversees policy, advocacy and political work for the entire enterprise. He and his team strategically influence public policy on behalf of Target at the federal, state and local level as well as efforts around Reputation and Risk and escalated risk events.

Isaac has more than twenty years of experience in government and public affairs, having worked in the U.S. House of Representatives, for a Leader of the U.S. Senate, and on congressional and presidential campaigns. This extensive government experience and over a decade of representing Fortune 100 companies makes Isaac one of the most respected advocates in Washington, D.C.

Before joining Target in 2012, Isaac was at the U.S. Chamber of Commerce as the Director of Congressional & Public Affairs, representing the biggest companies in the world on issues ranging from cyber security to education to immigration. He was a principal in the government relations firm of Austin, Copelin & Reyes, specializing in the design and execution of successful legislative policy and political strategies for local governments.

Prior to entering the private sector, Isaac served as a Policy Advisor to Senator Tom Daschle at the Democratic Policy Committee, where he worked with all Democratic Senators and staff to build consensus and implement policy to advance goals of the Democratic Leadership. He also served as Legislative Director for Representative Silvestre Reyes (D-TX). Additionally, Isaac served as an advisor to Senator Barack Obama's 2008 presidential campaign in the critical swing state of New Mexico. Isaac currently serves on the Dean's Advisory Council at the Humphrey School of Public Affairs at the University of Minnesota. He is also a board member of the Public Affairs Council, Bryce Harlow Foundation, and the Congressional Hispanic Leadership Institute (CHLI).

SPEAKERS



STEPHANIE RUHLE

*Host of 'The 11th Hour' on MSNBC and
Senior Business Analyst for NBC News.*

Stephanie Ruhle is the host of MSNBC's The 11th Hour with Stephanie Ruhle and appears across all NBC News and MSNBC platforms as NBC News' Senior Business Analyst, including NBC Nightly News with Lester Holt, TODAY, NBCNews.com, and TODAY.com's On The Money with Stephanie Ruhle. Ruhle is known for her business acumen, hard-hitting style, original reporting, and for bringing humanity to her news coverage.

SPEAKERS



MARIA SALAMANCA

General Partner

Ulu Ventures

Maria Salamanca is a General Partner at Ulu Ventures, a top seed-stage venture fund in Silicon Valley and the largest Latina-led venture fund in the U.S. Prior to Ulu, Maria was a Partner at Unshackled Ventures, a fund that fills a unique space in the entrepreneurial ecosystem by funding teams with immigrant founders at the earliest pre-seed stage. In 2018, she became the first Latina named to Forbes 30 Under 30 for Venture Capital and Business Insider's Under 30 Rising Stars. She was also recognized as one of the 2022 NVCA Venture Forward Rising Stars. Her support for the Latino community earned her the 2017 California Hispanic Chamber of Commerce Shark of the Year award.

Maria was the President and founding member of SomosVC, a 501(c)(3) organization dedicated to increasing and retaining the number of Latino venture capital professionals in the industry. The organization is also the first to provide an annual report on the state of Latino diversity in venture capital. Additionally, she serves on the school board for Orange County Public Schools (FL), the 8th largest U.S. school district, where she was the youngest and first LGBTQ person ever elected. Maria graduated from UC Berkeley, where she studied Political Science and Legal Studies with a minor in Public Policy.

SPEAKERS



MARIA ELENA SALINAS

Independent Journalists

Maria Elena Salinas, an award-winning journalist and author, is one of the most recognizable and respected journalists in the country. Salinas began her journalism career in 1981 as a reporter, anchor and public affairs host for KMEX-TV, Univision's affiliate in Los Angeles. In a career that spans four decades, it notably includes serving as co-anchor of Univision's evening news for more than 30 years and co-hosting news magazine *Aqui y Ahora*.

Her work earned the top awards presented in broadcasting, among them multiple Emmys, including a Lifetime Achievement Emmy, a Peabody, 3 Gracie Awards, the Edward R. Murrow Award, and the Walter Cronkite Award for Excellence in Television Political Journalism. Salinas has received several Lifetime Achievement Awards and has been inducted into the Hall of Fame of Broadcasting and Cable, the National Association of Broadcasters, and the National Association of Hispanic Journalists.

Salinas joined ABC News as a contributor and consultant to the Race and Culture Unit. She has reported stories for the award-winning news program *Nightline* and election coverage focusing on the Latino vote, among other shows and platforms, and was part of the Uvalde365 team that covered the school shooting's aftermath for one year.

Salinas is a founding member of the National Association of Hispanic Journalists and for over two decades, has provided dozens of students with a scholarship under her name. She also serves on the board of the Hispanic Scholarship Fund. She has received honorary doctorates from American University and California State University Fullerton.

SPEAKERS



JOSÉ TAVAREZ

*President, Bank of America New York City; Vice Chair, Private Bank
Bank of America*

As Bank of America's New York City President, José is responsible for delivering the unified capabilities of the Bank of America Corporation enterprise across its eight lines of business, to local clients. In addition to his role as New York City President, José also serves as vice chair, Private Bank where he leads strategic client partnerships across the Wealth Management, Global Markets and Investment Banking Businesses.

Over his career, Jose has held senior management positions within Bank of America's Global Markets Business, and Bank of America Private Bank. José serves as the National Co-Executive Sponsor of Bank of America's Hispanic/Latino Organization for Leadership and also served on the Bank of America Global Diversity and Inclusion Council.

José serves on the Board of Directors for the Partnership for New York City, the Board of the NY CEO Jobs Council, the Board of Trustees of the Spence School, the Board of Trustees of the Children's Aid Society, and the Board of Trustees of the New York City Police Foundation. He is also a member of the University of Pennsylvania Athletics and James Brister Society Partnership Board of Advisors.

José earned an undergraduate degree in economics from the University of Pennsylvania's Wharton School and an M.B.A. from Columbia Business School. He and his wife, Dr. Holly Phillips, reside in New York City with their daughters, Olivia and Pascale.

SPEAKERS



NINA VACA

*CEO & Chairman
Pinnacle Group*

Nina Vaca is an award-winning entrepreneur, CEO, board member, and philanthropist dedicated to connecting people with opportunities. In 1996, she founded Pinnacle Group, now the largest Hispanic-owned workforce solutions company in North America, serving over 20% of the Fortune 100. In 2024, Pinnacle Group ranked among the top 20 global Managed Service Providers (MSP) by Staffing Industry Analysts.

Under Vaca's leadership, Pinnacle has earned numerous accolades, including being named to the Inc. 500/5000 list 13 times. The Women Presidents' Organization recognized it twice as the fastest-growing woman-owned/led company in the U.S. Recently, Newsweek named Pinnacle one of America's Greatest Workplaces in multiple categories, including diversity and women.

Vaca's personal achievements include the Ernst & Young Entrepreneur of the Year award and induction into the Minority Business Hall of Fame. She was also named a Trailblazing Woman in Labor and Business by the Women's History Project.

Appointed by the White House as a Presidential Ambassador for Global Entrepreneurship in 2014, Vaca has traveled globally to uplift communities. She currently serves as Entrepreneur in Residence for the City of Dallas, appointed by Mayor Eric Johnson, and is a member of the Aspen Latinos in Society Advisory Board.

A proud Texas State University alumna, Vaca established the Nina Vaca Innovation & Entrepreneurship Endowment and holds honorary doctorates from several institutions.

SPEAKERS



FIDEL A. VARGAS

*President & Chief Executive Officer
HSF*

Fidel A. Vargas is President & CEO of HSF, one of the nation's leading nonprofit organizations.

Before joining HSF, Fidel was a Founding Partner of Centinela Capital Partners, an alternative asset management firm that invested nearly \$1 billion in leading emerging private equity and venture capital funds. At the age of twenty-three, Fidel was elected the country's youngest Mayor of a major city, Baldwin Park, California.

Fidel has served on various public and private sector boards and commissions, including President Clinton's Advisory Council on Social Security; President Bush's Commission on Strengthening Social Security; and Presidents Bush's and President Obama's Commission on Presidential Scholars. He currently serves on the Board of Directors of Snap Inc., the parent company of Snapchat, on President Biden's Commission on White House Fellowships, and the boards of the Charter School Growth Fund, the Latino Donor Collaborative, and the Latino Theatre Company of Los Angeles.

Fidel is an HSF alum and holds an M.B.A. and an A.B. in Social Studies from Harvard University.

Most important, Fidel is the oldest of eight children of Margarita and Fidel B. Vargas, who emigrated from Mexico to the United States to ensure their children had every opportunity to succeed. They grew up modestly in Baldwin Park, CA on their father's pay as a union carpenter and their mother's example as a community organizer. Fidel and his five sisters and two brothers attended Harvard, UC Santa Cruz, UC Berkeley, George Washington University, and Brown University.

PERFORMERS



BOBBY ALLENDE

Grammy-Nominated Percussionist and Musical Director

Bobby Allende is a world-renowned percussionist and Grammy-nominated artist whose dynamic career spans multiple genres, including Latin, jazz, rock, and pop. Known for his powerful rhythms and innovative style, Bobby has collaborated with iconic artists like Marc Anthony, Carlos Santana, Paul Simon, Celia Cruz, and Ruben Blades.

With decades of experience, Bobby has served as Musical Director for legends like Tito Nieves, La India, and Willie Colon, and performed on Broadway in Paul Simon's *The Capeman*. His global tours and studio recordings include work with the Spanish Harlem Orchestra, Harry Connick Jr., Jennifer Lopez, and more.

Bobby's talents extend beyond performance to percussion clinics, master classes, and endorsements with leading brands like Pearl Percussion, Vic Firth, and Zildjian. From White House performances to Madison Square Garden and Broadway stages, Bobby Allende continues to inspire audiences worldwide with his passion and artistry.

PERFORMERS



JOSÉ MANUEL DE SANTIAGO

Artist

Hailing from Los Angeles, José Manuel De Santiago is a gifted singer whose deep, soulful voice bridges the rich traditions of Mexican music and the timeless elegance of American crooners. Growing up in a family that cherished music, José was captivated by the heartfelt songs interpreted by legends like Pedro Infante, Jorge Negrete, Vicente Fernández, and Javier Solís. Simultaneously, he drew inspiration from the silky smooth sounds of American icons such as Frank Sinatra, Dean Martin, and Bing Crosby. Motivated by love and the desire to connect with others, he began performing for friends and family. His talent quickly earned him a spot as the lead singer in a mariachi group, a role he embraced for over a decade. While he has graced larger stages, José finds his greatest joy performing in personal settings like weddings, anniversaries, and even cherished occasions like a grandmother's birthday. He believes these moments provide an opportunity to forge a profound spiritual bond with his audience, transforming each song into a heartfelt narrative that rekindles cherished memories from the past.

PERFORMERS



DONALD VEGA

Grammy-Nominated Artist

Grammy-nominated artist Donald Vega was classically-trained in his native Nicaragua. Vega immigrated to the United States at age 14 and began learning the language of jazz from mentor Billy Higgins and bassist John Clayton. He graduated from University of Southern California, Manhattan School of Music and The Juilliard School where he studied with piano great Kenny Barron. In addition to touring with his own trio and quartet, Vega performs internationally as the pianist for world-renowned bassist Ron Carter. Vega is a professor at The Juilliard School, a 2023 Guggenheim Fellow for composition, and sits on the board of Back Country Jazz providing music education to underprivileged youth. His album *As I Travel* earned a Grammy-nomination for Best Latin Jazz Album. His first holiday album, *All Is Merry & Bright*, was released in October 2024, (Imagery). Vega is currently working on his next album, *Legacy*, an homage to the masters in jazz who shaped his musical journey. Visit www.donaldvega.com for more information.

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The Aspen Institute founded the Latinos and Society Program in 2015 to identify and promote solutions that foster greater opportunity for American Latinos and enable a more prosperous, inclusive America. Through proprietary research, partnerships with the private and public sectors, high-level gatherings, and community-building initiatives, Aspen Latinos ignites Latino growth and resiliency for the benefit of all Americans.

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