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Center for
Financial Services Innovation
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The 5th Annual **UNDERBANKED**

Financial Services Forum

Presented with the Center for Financial Services Innovation

SUCCEEDING IN A GROWING MARKET

JUNE 9-11, 2010
DORAL GOLF RESORT & SPA
MIAMI, FL

LOOK FOR DETAILS INSIDE

- Proven Strategies for Moving Forward
- Game-changing Technologies
- New Products and Services to Serve The Underbanked
- Latest Research from Industry Experts

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Message from Conference Chairperson



Dear Colleague:

As the economy begins showing early signs of a rebound, the financial services marketplace is in the midst of a major transformation. This is a defining moment for the industry, with increased government regulation and oversight, radically shifting norms and expectations, and a customer base finding itself more financially underserved than ever.

Now is the moment for those serving the underbanked to take stock of the past and prepare for the future. What will the "new normal" look like? What game-changing products and services are on the horizon? What can your organization do to better meet your underbanked customers where they are, and help them move forward?

There's no better place to find the answers to these questions than at the **5th Annual Underbanked Financial Services Forum, June 9-11, 2010 at the Doral Golf Resort & Spa in Miami, FL.**

The forum will help you lead your organization to greater success by...

- Delivering the latest research and the freshest insights
- The most promising advances in product development
- Marketing strategies and risk management practices
- Ample time for networking with a few new twists for 2010

This year's Forum will feature concurrent tracks focused on Credit, Payments, and Deposits. Every member of your organization will share experiences, ideas and connections and learn new approaches to implement optimal programs quickly and cost-effectively. The result: greater success in the underbanked sector.

The Underbanked Financial Services Forum remains the single best opportunity to learn and interact with the industry's best and most innovative practitioners, while giving you the tools and connections you need to build a successful program.

I invite you to join me and other industry leaders in Miami on June 9-11 for 2010's premier event on underbanked strategy. Make your reservations today.

Regards,

Jennifer Tescher
Director

CENTER FOR FINANCIAL SERVICES INNOVATION (CFSI)

Keynote and Featured Speakers

WEDNESDAY, JUNE 9, 2010
4:30 PM - 5:30 PM

KEYNOTE ADDRESS:
**Social Media Meets Financial
Services: Square the Circle**



Jack Dorsey
Founder
SQUARE

Jack Dorsey is the creator, co-founder, and Chairman of Twitter, Inc. Originally from St. Louis, Jack's early fascination for mass-transit and how cities function led him to Manhattan and programming real-time messaging systems for couriers, taxis, and emergency vehicles. Throughout this work Jack witnessed thousands of workers in the field constantly updating where they were and what they were doing; Twitter is a constrained simplification designed for general usage and extended by the millions of people who make it their own every day. Jack is dedicated to creating public goods which foster approachability, immediacy, and transparency, and is starting a second company named Square focused on bringing these concepts to commerce.

THURSDAY, JUNE 10, 2010
9:15 AM - 9:45 AM

FEATURED ADDRESS:
**Serving the Underbanked: A
Retailer's Perspective**



Susan Ehrlich
SVP and President,
Sears Financial Services
SEARS HOLDINGS
CORPORATION

Sears Financial Services serves over 40 million loyal shopper households across Sears Full Line Stores, Sears Essentials, Sears Grand, Kmart, Lands End, Sears Home Services and Sears Commercial -- providing an array of credit and payment vehicles including the Sears Card, Sears and Kmart Gift Cards, Layaway as well as third party payment acceptance to meet the diverse needs of our customers.

In her role, Susan leads the company's efforts to provide innovative payment and credit solutions that enable customers to do business with SHC and ensure a smooth and satisfactory customer experience wherever and whenever they use Sears products and services. In October 2010 *US Banker* magazine named Susan Ehrlich #17 in their Top 25 Women in Finance (non-Bank).

THURSDAY, JUNE 10, 2010
8:45 AM - 9:15 AM

FEATURED ADDRESS:
**Corporate Social Responsibility
and Consumer Policy**



Andrew D. Plepler
Global Corporate Social
Responsibility Executive and
Consumer Policy Executive
BANK OF AMERICA

Andrew D. Plepler is Bank of America's Global Corporate Social Responsibility Executive and Consumer Policy Executive. In this role, Plepler is responsible for formulating strategy and overseeing Bank of America's community engagement assets and activity, including the company's philanthropic grants, community development lending and investing goals, Community Reinvestment Act (CRA) compliance, associate volunteerism programs, partnerships with nonprofit organizations, arts and culture programming, and the environmental initiative. He also serves as the senior executive responsible for interfacing with consumer and community groups while representing Bank of America's position on critical consumer issues impacting those organizations and their constituents.

FRIDAY, JUNE 11, 2010
8:45 AM - 9:30 AM

FEATURED ADDRESS:
**Can Financial Product Design Lead
to Behavior Change?**



Mark Jones
Lead for Service Design
and Innovation
IDEO

As the lead for Service Innovation, Mark works closely with service companies seeking to reinvent how they serve their customers. Mark's extensive design background and his broad experience in qualitative and quantitative research methodologies allow him to uncover user issues and convert them into actionable design strategy.

Mark brings 15 years of research and design experience to IDEO. Mark's research philosophy is based on the principle that the introduction of new services can fundamentally change how people live their lives.

Agenda at-a-Glance

WEDNESDAY, JUNE 9, 2010

12:00 PM
Registration Opens

PRE-CONFERENCE WORKSHOPS

1:00 PM -2:30 PM
WORKSHOP A: Who is the Prepaid Consumer?

2:45 PM -4:15 PM
WORKSHOP B: Fun and Games: Learning about Financial Services

4:30 PM -5:30 PM
KEYNOTE ADDRESS: Social Media Meets Financial Services: Square the Circle

5:30 PM -6:30 PM
Networking Welcome Reception

THURSDAY, JUNE 10, 2010

7:30 AM - 8:15
Continental Breakfast and Registration

8:15 AM -8:45 AM
Chairperson's Welcoming Remarks

8:45 AM -9:15 AM
FEATURED ADDRESS: Corporate Social Responsibility and Consumer Policy

9:15 AM -9:45 AM
FEATURED ADDRESS: Serving the Underbanked: A Retailer's Perspective

9:45 AM -10:15 AM
Session To Be Announced

10:15 AM -11:15 AM
Networking Refreshment Break in Exhibit Hall

11:15 AM -12:00 PM
Federal Initiatives and the Underbanked

12:00 PM -1:15 PM
Luncheon for All Participants

1:15 PM -1:30 PM
Dessert in Exhibit Hall

CONCURRENT SESSIONS (SEE PAGES 7-9 FOR DETAILS)

CREDIT TRACK	1:30 PM - 2:15 PM Opportunities for Secured Cards	2:20 PM - 3:05 PM Small Dollar Loan Economics	3:45 PM - 4:30 PM Emerging Innovators in Credit	4:35 PM - 5:20 PM Credit Options for Emerging Markets	Networking and Refreshment Break in Exhibit Hall	Networking Reception in Exhibit Hall
	1:30 PM - 2:15 PM What is on the Horizon for Prepaid?	2:20 PM - 3:05 PM Emerging Innovators in Payments	3:45 PM - 4:30 PM Financial Alerts and the Underbanked: Beyond the Balance Alert	4:35 PM - 5:20 PM The Future of Checking Accounts		
	1:30 PM - 2:15 PM Going Deeper: New Segments of the Underbanked Market	2:20 PM - 3:05 PM Savings: The New Credit	3:45 PM - 4:30 PM Cutting-edge Savings Initiatives	4:35 PM - 5:20 PM Emerging Innovators in Deposits		

FRIDAY, JUNE 11, 2010

7:30 AM - 8:30 AM
Roundtable Café

7:45 AM - 8:30 AM
Continental Breakfast in Exhibit Hall

8:30 AM - 8:45 AM
Opening Remarks

8:45 AM - 9:30 AM
FEATURED ADDRESS: Can Financial Product Design Lead to Behavior Change?

9:30 AM - 10:15 AM
The Underbanked Are Online-Are You?

10:15 AM -10:45 AM
Networking and Refreshment Break in Exhibit Hall

10:45 AM - 11:45 AM
Financial Capability: Opportunities for Innovation

11:45 AM - 12:00 PM
Closing Remarks

12:00 PM
Conference Concludes

WEDNESDAY, JUNE 9, 2010

CONFERENCE AGENDA

12:00 PM

Registration Opens

1:00 -2:30 PM

Workshop A: Who is the Prepaid Consumer?

Prepaid cards have seen a significant increase in use during the economic downturn and continued growth is expected going forward. As this market continues to expand, understanding the characteristics, preferences and habits of cardholders is essential in order to better serve consumers. This session will provide research and data to paint a clear picture of how prepaid customers use their cards.

Robert Hunt, *Assistant Vice President*,
FEDERAL RESERVE BANK OF PHILADELPHIA

2:45-4:15 PM

Workshop B: Fun and Games: Learning about Financial Services

Applying real-life experiences is important for consumers when learning to use financial products. Several games, designed to teach financial concepts through experiential learning, have recently been released. Explore a sampling of the games available to further understand how these financial management tools teach key concepts and how

your organization can use these innovations to better serve consumers of financial services products.

Irene Skricki, *Program Manager for Assets and Savings*,
ANNIE E. CASEY FOUNDATION

4:30-5:30 PM

KEYNOTE ADDRESS: Social Media Meets Financial Services: Square the Circle

Jack Dorsey, co-founder of Twitter and visionary behind Square, is a true innovator in predicting how social interactions will evolve and how to tap into those changes. In this session, Jack will discuss his perspective on the unique relationship between social media transformations and financial transactions. Learn how Square is helping to empower micro-entrepreneurs throughout the United States by creating wealth through a new ecosystem of payments and credit services.

Jack Dorsey, *Founder*, **SQUARE**
Co-founder, **TWITTER**

5:30-6:30 PM

Networking Welcome Reception

THURSDAY, JUNE 10, 2010

CONFERENCE AGENDA

7:30 AM - 8:15 AM

Continental Breakfast

8:15-8:45 AM

Chairperson's Welcoming Remarks

Jennifer Tescher, *Director*, **CENTER FOR FINANCIAL SERVICES INNOVATION**

8:45-9:15 AM

FEATURED ADDRESS: Corporate Social Responsibility and Consumer Policy

Andrew D. Plepler, Global Corporate Social Responsibility Executive and Consumer Policy Executive from Bank of America, will discuss how corporate social responsibility and consumer policy fits into the agenda of a financial services company in today's environment.

Andrew D. Plepler, *Global Corporate Social Responsibility Executive and Consumer Policy Executive*,
BANK OF AMERICA

9:15-9:45 AM

FEATURED SPEAKER: Serving the Underbanked: A Retailer's Perspective

Susan Ehrlich, Sears Holdings Corp SVP, will share her perspective on the current macroeconomic environment and its impact on consumers, specifically focusing on implications for Sears and Sears Financial Services. Hear about the role of products such as layaway and the Christmas Club, how these fit within the history of Sears, and the direction of the company moving forward.

Susan Ehrlich, *SVP and President*, *Sears Financial Services*, **SEARS HOLDINGS CORPORATION**

9:45-10:15 AM

Session and Speaker To Be Announced

10:15-11:15 AM

Networking Refreshment Break in Exhibit hall

11:15-12:00 PM

Federal Initiatives and the Underbanked

In this session, federal policymakers will share their perspective and insights on how national initiatives and federal policies can improve the financial lives of the underbanked.

Speaker to be Announced

12:00-1:15 PM

Luncheon for all participants

1:15-1:30 PM

Dessert in Exhibit Hall

CONCURRENT SESSIONS
CREDIT TRACK

THURSDAY, JUNE 10, 2010

CONFERENCE AGENDA CONTINUED

1:30-2:15 PM

Opportunities for Secured Cards

For many new to credit or with damaged credit, a secured card represents an ideal transition tool into traditional credit products. In this session, hear new CFSI research on how secured cards can meet consumer needs and what they think about the cards relative to other credit building products on the market.

Kimberly Gartner, *Associate Director*, **CENTER FOR FINANCIAL SERVICES INNOVATION**
Elizabeth Hoople, *SVP, Division Marketing Manager*, **WELLS FARGO**

2:20-3:05 PM

Small Dollar Loan Economics

Financial services providers are developing lending models to meet the demand for affordable small dollar credit options that are self-sustaining and safe for the consumer. This session will feature industry innovators discussing the economic challenges in offering small dollar loans and the solutions they have put in place to create viable and safe products.

Jeffrey Burton, *SVP and Managing Director*, **FISERV, INC.**

Beth Kuhn, *Project Director*, **UNITED WAY OF CHITTENDEN COUNTY**

Andrew Morrison, *Executive Vice President*, **BRUNDAGE MANAGEMENT COMPANY**

Joshua Sledge, *Innovation Analyst*, **CENTER FOR FINANCIAL SERVICES INNOVATION**

3:10-3:40 PM

Networking and Refreshment Break in Exhibit Hall

3:45-4:30 PM

Emerging Innovators in Credit

In this dynamic venture investing session, learn how early growth-stage companies are leading the way in underbanked innovation. Watch and participate as several important credit innovators present their business before a panel of venture investors. The session is fast, interactive and invaluable to entrepreneurs, investors, corporate development professionals and prospective business partners.

Arjan Schütte, *Managing Partner*, **CORE INNOVATION CAPITAL**

4:35-5:20 PM

Credit Options for Emerging Markets

Immigrants represent a significant portion of the financially underserved in the U.S., many of whom find it difficult, if not impossible, to access credit from traditional lenders at affordable rates. Hear from three innovative institutions that have launched new initiatives designed to meet the credit needs of immigrants while leveraging their strong social ties and other important cultural aspects.

Patrick Brown, *EVP, Emerging Markets*, **NETSPEND**

James Gutierrez, *CEO*, **PROGRESO FINANCIERO**

Leslie Kane, *Vice President*, **GRAMEEN AMERICA, INC.**

Jose Quinonez, *Executive Director*, **MISSION ASSET FUND**

5:20-6:30 PM

Networking Reception in Exhibit Hall

CONCURRENT SESSIONS PAYMENTS TRACK

THURSDAY, JUNE 10, 2010 | CONFERENCE AGENDA CONTINUED

1:30-2:15 PM

What is on the Horizon for Prepaid?

The prepaid industry has experienced significant growth in recent years and its future continues to look promising. In this session, hear from providers who, to set themselves apart, are looking to gain underbanked market share by rethinking distribution and marketing strategies.

Michael Hafer, *Vice President, Global Cards*, WESTERN UNION

Dennis Marshall, *GM, Chief Business Development Officer*, CHICAGO TRANSIT AUTHORITY

Gary Palmer, *Founding Director and Chairman of the Board*, NETWORK BRANDED PREPAID CARD ASSOCIATION

Scott Scovel, *Vice President, Prepaid Financial Services*, UNIVISION COMMUNICATIONS, INC.

2:20-3:05 PM

Emerging Innovators in Payments

In this dynamic venture investing session, learn how early growth-stage companies are leading the way in underbanked innovation. Watch and participate as several important payment innovators present their business before a panel of venture investors. The session is fast, interactive and invaluable to entrepreneurs, investors, corporate development professionals and prospective business partners.

Arjan Schütte, *Managing Partner*, CORE INNOVATION CAPITAL

3:10-3:40 PM

Networking and Refreshment Break in Exhibit Hall

3:45-4:30 PM

Financial Alerts and the Underbanked: Beyond the Balance Alert

Many financial services providers in the US are experimenting with customer financial alerts. This session will focus on identifying the most promising innovations using mobile and other communication channels as a financial tool and as a means to profitably serve the needs of the underbanked.

Kevin Morrison, *Assistant Vice President, Card Products*, H&R BLOCK, INC.

Tim Walsh, *President & CEO*, READY CREDIT CORPORATION

Jonathan Zinman, *Associate Professor*, DARTMOUTH COLLEGE

4:35-5:20 PM

The Future of Checking Accounts

Redesigning the next-generation checking account to both be profitable for financial institutions and simultaneously provide consumers with additional value for the new fees they will likely incur will be critical for the longevity of checking accounts. In this session, hear how financial institutions are developing strategies and products for serving consumers with checking accounts in this new environment.

Rick Claypoole, *SVP & Director of Consumer Deposit Products*, BBVA COMPASS

Hank Israel, *Director*, NOVANTAS, LLC

5:20-6:30 PM

Networking Reception in Exhibit Hall

CONCURRENT SESSIONS DEPOSITS TRACK

THURSDAY, JUNE 10, 2010 | CONFERENCE AGENDA CONTINUED

1:30-2:15 PM

Going Deeper: New Segments of the Underbanked Market

Vivian Vasallo, *Senior Director, Office of Community Innovation*, AARP FOUNDATION

Chad Hendrickson, *Vice President, Marketing*, GUARANTY BANK

2:20-3:05 PM

Savings: The New Credit

As consumers recover from the debt hangover of the past decade, financial services providers are becoming more creative in helping customers grow their personal savings. By simplifying the customer experience and linking the concepts of savings and spending in unique ways, saving is becoming increasingly popular. In this session, hear from two leaders at U.S. Bank, working across business lines, who are helping customers build their savings to borrow from themselves.

Kimberly Gartner, *Associate Director*, CENTER FOR FINANCIAL SERVICES INNOVATION

Michael Shepard, *Vice President, Consumer Debit and Credit Products*, U.S. BANK

Kevin Wright, *Vice President, Emerging Markets and Segmentation Management*, U.S. BANK

3:10-3:40 PM

Networking and Refreshment Break in Exhibit Hall

3:45-4:30 PM

Cutting-edge Savings Initiatives

Two programs have recently been initiated to promote savings among the underbanked: The City of New York's \$aveNYC Account and D2D Fund's "Prize-linked Savings" pilot in conjunction with credit unions in Michigan. Learn how these programs were structured, marketed, and distributed to consumers and how they produced tangible results and concrete solutions for promoting savings among low-income, underbanked consumers.

Sarah Gordon, *Relationship Manager*, CENTER FOR FINANCIAL SERVICES INNOVATION

Timothy Flacke, *Executive Director*, DOORWAYS TO DREAMS (D2D) FUND

Caitlyn Brazil, *Deputy Director for Research & Policy*, CITY OF NEW YORK

4:35-5:20 PM

Emerging Innovators in Deposits

In this dynamic venture investing session, learn how early growth-stage companies are leading the way in underbanked innovation. Watch and participate as several important savings and deposits innovators present their business before a panel of venture investors. The session is fast, interactive and invaluable to entrepreneurs, investors, corporate development professionals and prospective business partners.

Arjan Schütte, *Managing Partner*, CORE INNOVATION CAPITAL

5:20-6:30 PM

Networking Reception in Exhibit Hall

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FRIDAY, JUNE 11, 2010 | CONFERENCE AGENDA CONTINUED

7:30-8:30 AM Roundtable Café

Join us for breakfast and explore the underbanked topic of your choice in a roundtable discussion with industry leaders, analysts, and experts.

8:30-8:45 AM Opening Remarks

Jennifer Tescher, *Director*, CENTER FOR FINANCIAL SERVICES INNOVATION

8:45-9:30 AM FEATURED ADDRESS: Can Financial Product Design Lead to Behavior Change?

IDEO, a design and innovation consulting firm, is responsible for forward-thinking product designs including Virtual Wallet for PNC and concepts like Keep the Change for Bank of America. In this session, Mark Jones, lead for service design and innovation from IDEO, will outline case studies of projects where human centered design meets data driven innovation to ultimately lead to financial behavior change in consumers.

Mark Jones, *Lead for Service Design and Innovation*, IDEO

9:30-10:15 AM The Underbanked Are Online – Are You?

The online channel has become a thriving financial services marketplace, with a variety of financial service providers establishing an online presence to attract and serve underbanked consumers. This session will feature the strategies and activities these innovative providers are rolling out to successfully reach the underbanked online.

Kathy Boden Holland, *Executive Vice President*, URBAN TRUST BANK

Rachel Schneider, *Innovation Director*, CENTER FOR FINANCIAL SERVICES INNOVATION

Will Tumulty, *President*, READY FINANCIAL GROUP

10:15-10:45 AM Networking and Refreshment Break in Expo Hall

10:45-11:45 AM Financial Capability: Opportunities for Innovation

Providers across the financial services landscape are embracing a new paradigm for financial education, a broader framework of financial capability, that offers a clearer vision of what success looks like, emphasizes behavior change rather than knowledge gains, and suggests the need for a broader range of tools. In this session, learn more about this shift and hear from two leading innovators who are employing new technologies and insights of behavioral economics to offer new tools that are helping consumers recover financially and to be strong financial stewards.

Amir Hemmat, *CEO*, SABEResPODER

Avinash Karnani, *Co-Founder*, THRIVE

Jennifer Tescher, *Director*, CENTER FOR FINANCIAL SERVICES INNOVATION

11:45-12:00 PM Closing Remarks

Jennifer Tescher, *Director*, CENTER FOR FINANCIAL SERVICES INNOVATION

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Attire: Business Casual

SourceMedia has secured a block of rooms at a special rate at the Doral Golf Resort & Spa. Be sure to mention that you're a 5th Annual Underbanked Financial Services Forum attendee when making your reservation. Please make your reservation by Friday, April 30, 2010.

JOIN US FOR A PRE-CONFERENCE WEB SEMINAR

Making the Most of the 5th Annual Underbanked Financial Services Forum

May 11, 2010, 1:00 PM - 2:30 PM CST

Join CFSI for a special web seminar presentation. Innovation Director Rachel Schneider will talk about the key themes of the conference, provide relevant background information on the underbanked, give important networking tips and equip you with important details for making the most of your time at the Forum.

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Latest updates on the 5th Annual Underbanked Financial Services Forum, June 9-11, 2010

Registration Rates

Attendee Type	Early Bird 1	Early Bird 2	Standard
Banks/Financial Institutions*	\$1095	\$1195	\$1295
Non-Profit/ Government/ Credit Union Executives**	\$595	\$795	\$895
All Others***	\$1495	\$1595	\$1695
Workshop A	\$99	\$99	\$99
Workshop B	\$99	\$99	\$99
EXPIRATION DATE	04/16/10	05/07/10	

PAYMENTS:

Please make checks payable to SourceMedia and include the name(s) of the attendee(s) on the face of the check. We accept American Express, Diners Club, Discover, Visa, and MasterCard. Registration fees include all meals, refreshment breaks, receptions and a copy of the conference workbook. In order to receive early bird discounts, special rates or promotions, full payment must be made prior to the offer expiration date. Any registration not paid in full at that time of offer expiration date will be subject to the current rate. Full Payment must be received 14 days prior to the event or your registration will automatically be cancelled. Registrations with declined or invalid credit cards will not be processed.

SUBSTITUTIONS AND CANCELLATIONS:

Substitutions may be sent at any time. No refunds or letters of credit are available later than the event Cut Off Date (14 Days prior to start date). All cancellations must be made in writing, submitted within 90 days prior to the Cut Off Date of the event and will be subject to a cancellation fee equal to 50% off the registration fee or a Letter of Credit which will cause forfeiture of the entire registration fee but allow one admittance to a future SourceMedia event to be used in the same year. No refunds will be issued on any Exhibit Hall Only passes.

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