

## SUNDAY, OCTOBER 5

12:00 PM – 2:00PM

### PRE-SUMMIT EXCURSION

Kick off the Prosperity Summit with a curated offsite excursion to the Smithsonian National Museum of African American History and Culture. Round-trip, ADA-compliant shuttle service will be provided.

2:00 PM – 8:00 PM  
*Mezzanine*

### REGISTRATION OPENS

Early badge pick up.

6:00 PM – 8:00 PM  
*Mezzanine Foyer*

### WELCOME RECEPTION

Join us as we kick off this year's Prosperity Summit with an energizing evening of delicious bites, lively music and standout networking. Celebrate collaboration and shared purpose as you reconnect with colleagues, meet new partners, and set the collective momentum for two days of learning and action. Sponsored by Friends of the National Museum of the American Latino.

## MONDAY, OCTOBER 6

8:00 AM – 9:00 AM  
*Independence Ballroom*

### COFFEE & CONTINENTAL BREAKFAST

9:00 AM – 11:00 AM  
*Marquis Ballroom  
5 & 6*

### PLENARY 1: CAPITAL, CREATIVITY AND THE HUSTLE FOR GOOD

Nonprofits aren't "no-profits." We care where capital flows and what it builds. This session brings together leaders shaping how companies channel resources for community good for a conversation on how institutions deploy resources to inspire change. It's designed for builders and bold thinkers - entrepreneurs, founders, creatives, and nonprofit leaders - who believe capital, used well, is a force for change. Together we'll explore what happens when institutional capital meets social purpose: treating local enterprises as long-term investments, designing revenue models alongside mission goals, and unlocking catalytic capital through partnerships, products, and storytelling. Expect candid playbooks on aligning mission with margin, measuring ROI as both "return on investment" and "return on inclusion," and building resilience through innovation. This isn't about charity; it's about strategy, scale, and who gets to shape the economy.

*Performance:* **Jennie Harney-Fleming**, Broadway Actress, The Color Purple and Hamilton on Broadway

*Sponsor Remarks:* **Erica Opstad**, SVP, Head of Community Affairs & President of the U.S. Bank Foundation

*Welcome Remarks:* **Courtney Howard Hodapp**, Chair, Prosperity Now; Managing Director, Head, Community Engagement, JPMorganChase

*Opening Remarks:* **Marisa Calderon**, President & CEO, Prosperity Now

*Rise Challenge Kickoff Remarks:* **Dujon C. Smith**, Global Investments Lead, Accenture Founders Development Program

*Rise Challenge Judges:* **T.J. Duckett**, "The Reignmaker," Former NFL Running Back, Co-Founder, Duckett Brothers Distribution  
**Latresa McLawhorn Ryan**, CEO, Blackbird Strategies  
**Victor Reinoso**, Entrepreneur in Residence, LearnerStudio

*Expert Panel:  
Moderator:*

**Marisa Calderon**, President & CEO, Prosperity Now

*Panelists:*

**Shena Ashley**, VP, Capital One Community Impact & Investment and President, Capital One Insights Center

**Darlene Goins**, EVP, Head of Philanthropy and Community Impact, President, Wells Fargo Foundation

**Roma Kaundal**, Managing Director and Head of U.S. Philanthropy, JPMorganChase

**Erica Opstad**, SVP, Head of Community Affairs & President of the U.S. Bank Foundation

## MONDAY, OCTOBER 6 *continued*

11:00 AM – 12:30 PM  
*Independence Ballroom*

### LUNCH & NETWORKING

Make the Exhibit Hall your mid-day hub: enjoy lunch, refresh your professional brand with on-site headshots, and spark new connections with peers and partners. Drop in for lively networking, meet exhibitors, and leave with both a great photo and great leads.

12:30 PM – 1:45 PM  
*Marquis Rooms  
1-3; 8-10 and 12-15*

### BREAKOUT SESSION SERIES 1

Dive into practitioner-led sessions spanning homeownership, reflective wellness, entrepreneurship, AI, Crypto/blockchain, clean energy, and tax & family support policy. Curated by experts from the field, these breakouts spotlight real-world case studies, practical tools, and policy pathways—everything from financing homeownership and launching ventures to navigating AI at work, responsible crypto use, emerging clean-energy jobs, and smart tax strategies that strengthen families. Expect candid lessons, actionable playbooks, and peer exchange you can take home and put to work immediately.

### NETWORK CONVENINGS

Network members are invited to spend the afternoon in hands-on, workshop style programming led by field experts.

**Entrepreneurship Network Convening:** Train-the-Trainer.

**Child and Family Support Network Convening.**

1:45 PM – 1:55 PM

### BREAK

1:55 PM – 3:25 PM  
*Marquis Ballroom 5-6*

### PLENARY 2: INNOVATION OVER NOSTALGIA – AI, CRYPTO AND AMERICA'S NEXT WORKFORCE

From AI and digital tools to new financial products and platforms, innovation is reshaping how families earn, save, and build security. With every leap forward there are also new risks, including more sophisticated scams and fraud, that require equally creative solutions. This session highlights how nonprofits, researchers, and financial institutions are embracing innovation with intention, developing tools, testing models, and building safeguards so households can thrive in a changing economy. Leaders from FinRegLab, SaverLife, Commonwealth, Blockchain Foundation, and Prosperity Now, will share how evolving skillsets, financial products, and consumer protections can open doors to opportunity while avoiding unintended consequences.

	<i>Session Intro:</i>	<b>Garnesha Ezediaro</b> , Greenwood Initiative Lead, Bloomberg Philanthropies
	<i>Sponsor Remarks</i>	<b>Sarah Bainton Kahn</b> , Executive Director, National Community Engagement, JPMC
	<i>Fireside Chat</i>	<b>Cleve Mesidor</b> , Executive Director, Blockchain Foundation <b>Marisa Calderon</b> , President & CEO, Prosperity Now
	<i>Expert Panel</i>	<b>Dave Uejio</b> , COO, Prosperity Now <b>Timothy Flacke</b> , Co-Founder & CEO, Commonwealth <b>Melissa Koide</b> , CEO, FinRegLab <b>Leigh Phillips</b> , President, SaverLife
3:25 PM – 3:35 PM	<b>BREAK</b>	
3:35 PM – 4:50 PM <i>Marquis Rooms</i> <i>1-3; 8-10 and 12-15</i>	<b>BREAKOUT SESSION SERIES 2</b>  Dive into practitioner-led sessions spanning homeownership, reflective wellness, entrepreneurship, AI, Crypto/blockchain, clean energy, and tax & family support policy. Curated by experts from the field, these breakouts spotlight real-world case studies, practical tools, and policy pathways—everything from financing homeownership and launching ventures to navigating AI at work, responsible crypto use, emerging clean-energy jobs, and smart tax strategies that strengthen families. Expect candid lessons, actionable playbooks, and peer exchange you can take home and put to work immediately.	<b>NETWORK CONVENINGS</b>  <b>Tax Opportunity Network Convening.</b>
4:50 PM – 6:30 PM	<b>BREAK</b>	
6:30 PM – 7:30 PM	<b>GALA RECEPTION</b> <i>Marquis Ballroom Foyer</i> Ahead of the ticketed Prosperity Now Awards Gala, guests are invited to enjoy cocktails, mocktails and enjoy one another's company.	<b>PRESIDENT'S RECEPTION</b> <b>(by invitation)</b> <i>Marquis Salon 7</i>
7:30 PM – 10:00 PM <i>Marquis Ballroom</i> <i>5 &amp; 6</i>	<b>PROSPERITY NOW AWARDS GALA (ticketed event)</b> An evening of music, film, and storytelling that celebrates resilience and shared values. The evening opens with a presentation of the Bob Friedman Award, honoring an individual whose ongoing leadership and sustained contributions continue to shape the field and expand economic opportunity. Guests will also receive an <b>exclusive first look</b> at Prosperity Now's short documentary on rebuilding Los Angeles after the wildfires, centering Altadena's communities and the human spirit behind economic recovery. The program culminates with <b>Bearing Witness: The Unshakable Power of Storytelling</b> , a live conversation highlighting how artists, journalists, and community voices connect lived experience to policy and spark action. Come ready for goosebumps, hard truths, and moments of reflection—then leave inspired to help write the next chapter of shared prosperity.	

<i>Opening Remarks:</i>	<b>Estuardo Rodriguez</b> , President & CEO, Friends of the National Museum of the American Latino <b>Annie Burns</b> , Partner, GMMB
<b>Award Presentation:</b>	
<i>Award Honoree:</i>	<b>Ron Grzywinski</b> , Co-Founder and Chair (Ret.) ShoreBank
<i>Invocation By:</i>	<b>Jackson Brossy</b> , VP, Native American Financial Services, Huntington Bank
<i>Documentary Intro:</i>	<b>Bea Stotzer</b> , CEO, NEW Capital
<i>Documentary First Look Discussion:</i>	<b>Shea William Vanderpoort</b> , Filmmaker, New Vizion Films <b>Zaire "Coach Z" Calvin</b> , CEO, Xtreme Athletics
<i>Storytelling Panel Discussion:</i>	<b>Jim Acosta</b> , Broadcast Journalist <b>Marisa Calderon</b> , President & CEO, Prosperity Now <b>Stephen Satterfield</b> , Food Writer, Producer, Media Entrepreneur <b>Alberto Ferreras</b> , Author, Filmmaker, Creative Consultant

## TUESDAY, OCTOBER 7

8:00 AM – 9:00 AM  
*Independence Ballroom*

### COFFEE & CONTINENTAL BREAKFAST

9:00 AM – 11:00 AM  
*Marquis Ballroom  
5 & 6*

### PLENARY 3: BUILDING PROSPERITY BY DESIGN:

What if every child in America entered adulthood with a financial foundation strong enough to support education, homeownership, or even starting a business? This session explores some of the existing and proposed policies for early wealth building, including Trump Accounts, Baby Bonds, and enhancements to the Child Tax Credit (CTC). Each offers a different approach to helping families save earlier and more consistently to ensure resources are available at critical life milestones. The discussion will explore the promise and pitfalls of these policies. What is the current state – and the future – of the field, the research, and public policy. What shortcomings might limit their reach or effectiveness? How do we make sure families with the least resources benefit the most? This session will offer a practical look at how early wealth-building tools could shape the pathways to financial security for future generations.

*Session Intro* **Joe Nery**, Partner, Nery, Richardson & Konewko, LLC

*Expert Panel:*  
*Moderator:* **Robin McKinney**, CEO, CASH Campaign of Maryland

*Panelists:* **Ray Boshara**, Senior Policy Advisor, WashU Financial Security Program, The Aspen Institute  
**Emily Wielk**, Senior Policy Analyst, Bipartisan Policy Center  
**Pete Sepp**, President, National Taxpayers Union

11:00 AM – 12:30 PM  
*Independence Ballroom*

### LUNCH & NETWORKING

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11:30 AM – 1:55 PM  
*Marquis Salon 7*

### AMERICAN LATINOS 1935–1945

Come experience a powerful multimedia art installation by award-winning artist **Alberto Ferreras** that brings to life the stories of Hispanic Americans. The installation will run every 15 minutes during this period.

12:30 PM – 1:45 PM  
*Marquis Salon 14*

### LATINA WEALTH IN AMERICA: BREAKING BARRIERS, BUILDING FUTURES: WHAT THE NUMBERS SAY AND WHAT COMMUNITIES KNOW BY LATINOPROSPERITY

Latino Prosperity unveils data and insights on the drivers and barriers shaping Latina wealth—wages and caregiving, entrepreneurship and access to capital, homeownership pathways, immigration-related frictions, and regional differences.

*Panelists:*

**Orson Aguilar**, President & CEO, LatinoProsperity  
**Rita German**, Vice President, National Community Engagement, JPMorganChase  
**Marlene Orozco**, Founder & CEO, Stratified Insights  
**Tonantzin Carmona**, Fellow, Brookings Institution  
**Janis Bowdler**, Former Racial Equity Advisor, U.S. Department of the Treasury  
**Sabrina Terry**, Chief of Programs and Strategic Development, NCRC  
**Marla Bilonick**, President and CEO, NALCAB

12:30 PM – 1:45 PM  
*Marquis Rooms  
1-3; 8-10 and 12-15*

### BREAKOUT SESSION SERIES 3

Dive into practitioner-led sessions spanning homeownership, reflective wellness, entrepreneurship, AI, Crypto/blockchain, clean energy, and tax & family support policy. Curated by experts from the field, these breakouts spotlight real-world case studies, practical tools, and policy pathways—everything from financing homeownership and launching ventures to navigating AI at work, responsible crypto use, emerging clean-energy jobs, and smart tax strategies that strengthen families. Expect candid lessons, actionable playbooks, and peer exchange you can take home and put to work immediately.

### NETWORK CONVENINGS

Network members are invited to spend the afternoon in hands-on, workshop style programming led by field experts.

**Entrepreneurship Network Convening:** Train-the-Trainer.

**Housing and Homeownership Network Convening.**

1:45 PM – 1:55 PM

### BREAK

1:50 PM – 3:30 PM  
*Marquis Ballroom 5-6*

### PLENARY 4: HOMEOWNERSHIP REIMAGINED – INNOVATION, OPPORTUNITY AND THE AMERICAN DREAM

Homeownership is still central to the American Dream, but a one-size-fits-all 30-year mortgage no longer fits today's realities—rising costs, multigenerational households, and nontraditional income. This session brings together two angles on change: a conversation with professional athletes investing back home and restoring the power of place — through innovative approaches to housing, ownership, neighborhood revitalization, and infrastructure investments in the communities that shaped them—and a panel of entrepreneurs reimagining access through co-

buying, modular construction, cooperative and shared-appreciation models, and alternative credit pathways. This session explores how these approaches expand affordability, build wealth, and strengthen place—alongside the consumer protections and policy frameworks needed to ensure innovation serves working families, not just investors. Expect practical models, policy levers, and replicable ideas to restore the power of place and widen the path to ownership.

*Sponsor Remarks:* **Shena Ashley**, VP, Capital One Community Impact & Investment and President, Capital One Insights Center

*Investor Panel:* **Jim Park**, CEO, Association of Asian American Investment Managers  
**Sheldon Day**, Defensive Tackle, Washington Commanders and President, The Players' Company  
**Kellie Wells Brinkley**, U.S. Bronze Medalist, 2012 Olympics  
**Doug Williams**, Washington Commanders Hall of Famer  
**Jacob Murrel**, Professional Soccer Player, D.C. United

*Sector Expert Panel:* **Chrissi Johnson**, CSIO, Prosperity Now  
**Marcus Martin**, CEO, Homium, Inc.  
**Niles Lichtenstein**, CEO, Nestment  
**Tamara Knox**, Co-founder and CEO, Frolic Community  
**Brian Gaudio**, Co-Founder and CEO, Module

3:30 PM – 3:40 PM

## BREAK

3:30 PM – 5:00 PM  
*Marquis Salon 7*

## AMERICAN LATINOS 1935–1945

Come experience a powerful multimedia art installation by award-winning artist **Alberto Ferreras** that brings to life the stories of Hispanic Americans. The installation will run every 15 minutes during this period.

3:40 PM – 4:55 PM

## BREAKOUT SESSION SERIES 4

*Marquis Rooms*  
 1-3; 8-10 and 12-15

Dive into practitioner-led sessions spanning homeownership, reflective wellness, entrepreneurship, AI, Crypto/blockchain, clean energy, and tax & family support policy. Curated by experts from the field, these breakouts spotlight real-world case studies, practical tools, and policy pathways—everything from financing homeownership and launching ventures to navigating AI at work, responsible crypto use, emerging clean-energy jobs, and smart tax strategies that strengthen families. Expect candid lessons, actionable playbooks, and peer exchange you can take home and put to work immediately.

## STREET FAIR

*Independence Ballroom*

Mix, mingle, and unwind at Prosperity Summit's annual Street Fair—an upbeat afternoon with live entertainment. Stroll the exhibits, spark new connections, and enjoy a festive atmosphere built for easy networking and serendipitous meetups.

Sponsored by U.S. Bank.

*Street Fair continues until 5:30 PM.*

4:50 PM – 6:30 PM  
*Beer Lab*

## LEADERSHIP RECEPTION (by invitation)

5:00 PM – 8:30 PM

**DINNER BREAK ON OWN**

Enjoy the wide variety of dining that DC has to offer, then rejoin friends and colleagues for an evening to remember at Club Prosperity.

8:30 PM – 11:00 PM  
*Marquis Ballroom 5-6*

**CLUB PROSPERITY: AN UNFORGETTABLE NIGHT WITH TLC (ticketed event)**

Step into the Prosperity Summit's premier evening experience at Club Prosperity. Guests will enjoy decadent desserts, crafted nightcaps and zero-proof drinks, and an electric, club-like atmosphere complete with lounge seating, lively networking, and a DJ spinning late-night dance vibes. The highlight of the night: a special live performance by the legendary TLC ahead of their highly anticipated musical, *Crazy, Sexy, Cool*, set to debut next June in Washington, D.C. Known for breaking barriers and giving voice to community through music and activism, TLC's performance underscores their continued commitment to uplifting people and celebrating collective resilience. Join us for an evening where connection, culture, and community come together in rhythm.