

2022

FDATA



# OPEN FINANCE SUMMIT

#FDATADC

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# Summit Overview

The FDATA Open Finance Summit aims to foster collaboration among policymakers, regulators, and industry leaders to advance the global open finance movement. By sharing insights, exploring innovations in payment modernization, and learning from diverse international perspectives, the summit seeks to inspire actionable strategies that empower consumers, promote financial inclusion, and drive a more transparent and connected financial ecosystem.



# Summit Agenda

- 01 Breakfast **INTUIT**  
7:30 AM- 8:30 AM
- 02 Welcome Remarks  
8:30 AM-8:35 AM
- 03 Policy Fireside Chat **INTUIT**  
**LESSONS FROM THE GLOBAL TRENCHES**  
8:35 AM-9:35 AM
- 04 Commercial Session  
**LESSONS FROM THE GLOBAL TRENCHES**  
9:20 AM-10:05 AM
- 05 Break **Pontera**  
10:05 AM-10:20 AM
- 06 Commercial Session  
**MARKET-LED VS. POLICYMAKER DRIVEN**  
10:20 AM-11:00 AM
- 07 Keynote: US Rep. Andy Barr (R-KY)  
11:00 AM-11:30 AM
- 08 Policy Fireside Chat  
**MARKET-LED VS. POLICYMAKER DRIVEN**  
11:30 AM-12:15 PM

- 09 Lunch **PLAID**  
12:15 PM-1:00 PM
- 10 Keynote: Grovetta Gardineer  
1:00 PM-1:30 PM
- 11 Commercial Session  
**FROM OPEN BANKING TO OPEN DATA**  
1:30 PM-2:15 PM
- 12 Commercial Session  
**MODERNIZED PAYMENT FACILITATION IN OPEN BANKING**  
2:15 PM-3:00 PM
- 13 Break 3:00 PM-3:15 PM      Regulators Only Session 3:15 PM-5:00 PM
- 14 Commercial Session  
**TECHNICAL STANDARDS: NORTH AMERICA VS. THE WORLD**  
3:15 PM-4:00 PM
- 15 Commercial Session  
**EMERGING GLOBAL TRENDS IN DATA PRIVACY**  
4:00 PM-4:45 PM
- 16 Closing Remarks  
4:45 PM-5:00 PM

# A Note From Our CEO

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Unquestionably, there are seismic shifts across the policy landscape directly impacting the frameworks and mechanisms that shape and enable the economy. The FDATA Global Open Finance Summit has consistently delivered an invaluable forum for deep dialogue and knowledge exchange, convening a broad representation of financial services industry delegates, international regulators, and policymakers. As open finance continues to inexorably proliferate across multiple jurisdictions in both regulatory and market-led manifestations, the Summit provides a unique and essential opportunity to engage with the global conversation.

**Richard Prior**

”



# Summit Speakers



Alan Butler



Adam Cox



Rep. Andy Barr



Bob Pivoris



Brian Fritzsche



Brian Costello



Barbara Sondag



Rebecca Mulholland



Candace Evilsizor



Dan Murphy



Darren Ellis



Eyal Sivan



Grovetta Gardineer



Henk Van Hulle



Jane Barratt



Laine Williams



Jenn Underwood



Josh Rubin



Julien Brazeau



Kirsten Fraser



Kevin Feltes



Matt Janiga



Matheus Rauber



Steve Boms



Meredith Fuchs



Mike Cascone



Oliver Stanley



Paul LaRusso



Pavle Avramović



Tanya Woods



Tom Carpenter



Zoë Strickland

# Breakfast

“

**Intuit is promoting open finance by participating in events like the FDATA Summit that helps educate policymakers and stakeholders on the benefits of open finance. We emphasize that open finance empowers consumers and small businesses by giving them control over their own financial data, as well as fostering innovation and enhancing competition within financial services.**

**It's crucial for policymakers to act now to establish a framework that protects consumers' rights, ensures data security, and encourages the development of new financial solutions that benefit consumers and small businesses.**

## **Bob Pivoris**

Senior Manager of Public Policy and Regulatory Affairs in Cybersecurity at Intuit

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# INTUIT

**Powering prosperity around the world**

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# Opening Remarks



Steve Boms

Executive Director, FDATA North America

# Policy Fireside Chat - Lessons from the Global Trenches

As the policy path forward for open finance in North America becomes more murky, regulators from around the world share the lessons learned in implementing open finance regimes.



**Dan Murphy**

Former CFPB Open Banking Program  
Manager



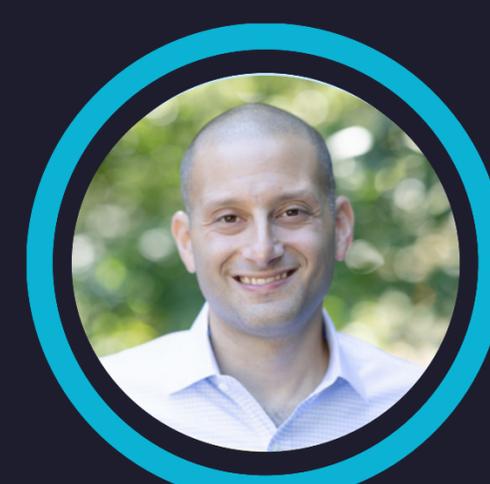
**Kirsten Fraser**

Finance Canada



**Pavle Avramović**

Cambridge Centre for Alternative Finance



**Steve Boms**

FDATA North America

## Commercial Session - Lessons from the Global Trenches

Industry collaboration has delivered meaningful progress towards open finance regimes globally. Hear industry experts discuss what they've learned from their work building and implementing smart data ecosystems around the world.



**Bob Pivoris**  
Intuit



**Mike Cascone**  
Xero



**Darren Ellis**  
Yodlee



**Laine Williams**  
FDATA North America

# Break

Relax

Sit Back

Hashtag

# Commercial Session - Market-Led vs. Policymaker-Driven

As North America stands at the precipice of implementing open finance, industry leaders will discuss the appropriate roles of government and market stakeholders in delivering smart data ecosystems.



**Kevin Feltes**  
FDX



**Paul LaRusso**  
Akoya



**Henk Van Hulle**  
Open Banking Ltd.



**Meredith Fuchs**  
Plaid



**Rebecca Mulholland**  
FDATA North America

# Keynote

Rep. Andy Barr (R-KY)

Chairman of the Subcommittee on Financial Institutions and  
Monetary Policy on the House Financial Services Committee



# Policy Fireside Chat - Market-Led vs. Policymaker-Driven

As the Americas stand at the precipice of implementing open finance, global policymakers will share their views on the appropriate roles of government and market stakeholders in delivering smart data ecosystems.



**Julien Brazeau**  
Finance Canada



**Matheus Rauber**  
Banco Central do Brasil



**Richard Prior**  
FDATA Global



# Lunch

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Powering the services that American companies rely on to do business and that millions of consumers trust to manage their financial lives.

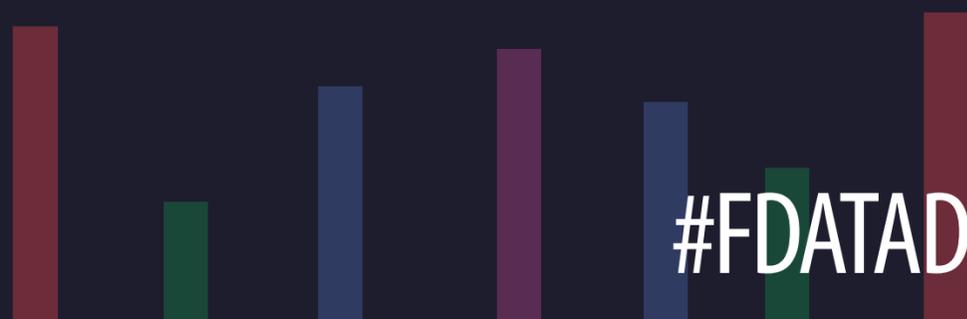
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**PLAID**

Unlocking financial freedom for everyone



#FDATADC

# Keynote

**Grovetta Gardineer**

**Senior Deputy Comptroller for Bank Supervision Policy,  
Office of the Comptroller of the Currency**



**#FDATADC**

## Commercial Session - From Open Banking to Open Data

As North America stands at the precipice of implementing open finance, industry leaders will discuss the appropriate roles of government and market stakeholders in delivering smart data ecosystems.



**Jane Barratt**

MX



**Josh Rubin**

Betterment



**Oliver Stanley**

DBT



**Brian Costello**

Morningstar Wealth

# Commercial Session - Modernized Payment Facilitation in an Open Banking Framework

Industry leaders whose organizations are on the cutting edge of delivering innovative payments solutions will share their perspectives on the interplay between smart data and innovative, competitive payments systems.



**Matt Janiga**  
Trustly



**Brian Fritzsche**  
CBA



**Tom Carpenter**  
Mastercard



**Dan Murphy**  
Former CFPB Open Banking Program  
Manager

# Break

Relax

Sit Back

Hashtag



# Regulators-Only Session

# Commercial Session - Technical Standards: North America vs the World

Technical standards are the underpinning to a successful open finance ecosystem. This panel will discuss the importance of collaboration to ensure a robust open finance system in which all users can participate.



**Candace Evilsizor**

Method Financial



**Eyal Sivan**

Ozone API



**Jenn Underwood**

FinGoal



**Adam Cox**

Open Banking Expo

# Commercial Session - Emerging Global Trends in Data Privacy

In a data-driven financial services ecosystem, data privacy is critical. Panelists will share their views on privacy considerations as developed markets enter and maintain open finance.



**Zoë Strickland**

Future of Privacy Forum



**Barbara Sondag**

Intuit



**Alan Butler**

EPIC



**Tanya Woods**

Questrade

# Closing Remarks



Steve Boms

Executive Director, FDATA North America

# Thank you to Our Sponsors

