



# 2024 Economic Forecast and Business Leadership Summit

**Thursday, February 22, 2024**

**Noon – 5:00 p.m.**

**Sheraton Harrisburg/Hershey**

## **Agenda:**

**Noon Registration, Networking, & Lunch**

**1:00 p.m. Opening Remarks**

- *Manny Mar (Santander), Board Chair, PA Chamber of Business & Industry*
- *Angie Sargent (Fulton Bank), Board Chair, PA Bankers Association*

**1:15 p.m. Pennsylvania Economic Forecast**

- *Matthew Knittel, Executive Director, Independent Fiscal Office*

**2:00 p.m. U.S. Economic Outlook**

- *Russell Mills, Sr. Principal & Sr. Regional Officer, Pittsburgh Officer, Federal Reserve Bank of Cleveland*

**2:45 p.m. Networking Break**

**3:00 p.m. Battleground 2024: Pennsylvania's Role in the National Political Landscape**

- *Neil Bradley, Executive Vice President, Chief Policy Officer, & Head of Strategic Advocacy, U.S. Chamber of Commerce*
- *Rob Engstrom, Chief Political Strategist, American Bankers Association*
- *Luke Bernstein, President & CEO, PA Chamber of Business & Industry*
- *Duncan Campbell, President & CEO, PA Bankers Association*
- *Allison Coccia, Director of Political Engagement, PA Chamber of Business and Industry – Moderator*

**4:00 p.m. Fintech Transformers: Redefining Banking and Retail in the Digital Age**

- *Dave DeFazio, Partner, StrategyCorps*

Highly acclaimed economic prognosticator, StrategyCorps Partner Dave DeFazio, will offer a deep dive into Pennsylvania's future potential for growth and job creation. DeFazio's extensive financial services experience and expertise in data, marketing, and technology make him a leader in innovation and profitability in the ever-changing, mobile-centric global economy.

**5:00 p.m. Reception — Honoring Gene Barr  
CPBJ Icon Honors Award Recipient**

The PA Chamber Foundation is pleased to announce a reception immediately following the 2024 Economic Forecast and Business Leadership Summit in honor of former PA Chamber President and CEO Gene Barr. The reception will honor Barr for having earned the Central Penn Business Journal's "Icon Honors" award for his success and leadership while at the helm of the PA Chamber.

We invite all attendees to stay for the reception congratulating Gene, whose development and execution of the annual Economic Forecast and Business Leadership Summit was among his many accomplishments!

## About the Speakers



**Manuel Mar Jr., CTP**  
**Senior Vice President & Senior Relationship Manager**  
**Santander Mid-Atlantic | Corporate & Middle Market Banking**

Manny Mar is Senior Vice President and Senior Relationship Manager within the Corporate and Middle Market Banking segment in Santander's Global Commercial Banking line of business. He specializes in working with Commercial and Industrial institutions, focusing on building valuable long-term relationships by providing expertise in credit and finance, treasury management, capital raising and risk management, and investment management products to deliver superior financial solutions.

Before joining Santander, Manny served as Senior Relationship Manager with Bank of America and as a Pennsylvania/Delaware Market Leadership Team member. In that role, he managed a client portfolio of Middle Market Commercial and Industrial institutions and the non-profit segment. In an earlier role at J.P.Morgan, Manny served as Relationship Manager, where he managed a client portfolio comprised of healthcare institutions in the Northeast and Mid-Atlantic states. He also served as Controller, supporting Investment Banking Risk under the Finance and Business Management division.

Manny is FINRA Series 7 & 63 licensed, holds an M.B.A. with a concentration in Finance from Marymount University, and a B.S. in Economics from The Pennsylvania State University. He is a J.P.Morgan Credit Training Program graduate, and was awarded the Certified Treasury Professional designation from the Association for Financial Professionals in December 2016. He is also highly active in his community, having served on the boards of Community Volunteers in Medicine (CVIM), the Young Professional Network as part of the Philadelphia Hispanic Chamber, and the Healthcare Financial Management Association (HFMA).

As Chair of the Board of Directors for the Pennsylvania Chamber, Manny is dedicated to working with his fellow Directors and key pro-growth stakeholders to form deep and meaningful partnerships and work toward strengthening our Commonwealth's growth potential. In doing so, Manny's legacy will be to help the PA Chamber seize this transformative moment in our state's history, and have Pennsylvania become the most economically competitive state in the nation.

Manny can be reached at [manuel.mar@santander.us](mailto:manuel.mar@santander.us) or 703.994.9290.



**Angela Sargent is Senior Executive Vice President, Chief Information Officer of Fulton Bank, a \$27 billion bank headquartered in Lancaster, Pa.**

Ms. Sargent joined Fulton Bank in 1992 as a product specialist in personal computing. She has held various positions, including senior product specialist and business technology manager. In 1997, she was promoted to vice president of business technology and telecommunication manager for the Corporation. Ms. Sargent has also held the positions of vice president of business technology manager and senior vice president/chief information officer of operations and information technology manager. In 2006, she was promoted to executive vice president/chief information officer of operations and information technology manager. In 2013, she was promoted to senior executive vice president and joined the Corporation's senior management team.

She historically has served on the board of directors for the Lancaster County Conservancy, Lancaster County United Way, and the Hamilton Club of Lancaster. She is a member of the BITS CIO Leadership Forum for the Financial Services Roundtable and the United Way of Lancaster Women United. Ms. Sargent has served the Pa Bankers Association in several capacities, and she is currently serving as the Chair of the Board of Directors.

Ms. Sargent received her Bachelor of Science degree in Information Systems from the University of Scranton. She is a graduate of the Stonier Graduate School of Banking and the Harvard Business School Advanced Management Program.



**Matthew Knittel, Director, Independent Fiscal Office**

Formerly employed as a financial economist by the US Department of Treasury and an economist by the Michigan Department of Treasury. Mr. Knittel holds a M.A. and Ph.D. in Economics from Michigan State University and a bachelor's degree in Economics from Hope College in Holland, Michigan. Mr. Knittel has taught courses at Johns Hopkins, Temple and Penn State Universities and published several articles in the National Tax Journal, the NBER and US Treasury's Office of Tax Analysis working paper series.



**Russell Mills, Sr. Principal & Sr. Regional Officer, Pittsburgh Officer, Federal Reserve Bank of Cleveland**

Russell Mills is a Senior Principal and the Senior Regional Officer of the Federal Reserve Bank of Cleveland's Pittsburgh Branch. He is responsible for managing relationships with regional stakeholders, monitoring the region's economic environment, and speaking to regional audiences on national and regional economic conditions. Additionally, he participates in briefings that support the Bank president's role on the Federal Open Market Committee (FOMC). He also manages the Bank's relationships with the Pittsburgh Branch's board of directors and business advisory councils in southwest Pennsylvania, northwest Pennsylvania, and northwest Ohio.

Dr. Mills joined the Federal Reserve Bank of Cleveland in 2023. Prior to taking on his current role, he oversaw the Center for Regional Development at Bowling Green State University, leading a team in economic, community, and workforce development projects across 31 counties in northwestern Ohio. Prior to his time at the center, Dr. Mills was an associate professor of political science at BGSU and a policy analyst at the Federal Aviation Administration in Washington D.C.

He holds a BA in political science from Westminster College, an MPA from the University of Vermont, and a PhD in political science from Kent State University.



**Neil Bradley, Executive Vice President, Chief Policy Officer, & Head of Strategic Advocacy, U.S. Chamber of Commerce**

As executive vice president, chief policy officer, and head of strategic advocacy at the U.S. Chamber of Commerce, Neil Bradley is responsible for the organization's overall advocacy efforts. In addition to managing policy development for the Chamber, Bradley oversees its government affairs activities, political program, and relations with other business organizations.

At the Chamber, Bradley has led the national discussion on hundreds of high-profile policy issues, influencing legislation at the federal, state, and local levels. He frequently appears on broadcast and cable news networks to present the business community's priorities.

Prior to joining the Chamber, Bradley spent nearly 20 years working in the House of Representatives, including 11 years working for the House Republican leadership. He served as deputy chief of staff for then-Majority Leader Kevin McCarthy (CA) where he developed the legislative agenda for House Republicans, oversaw policy formulation in the leader's office, and coordinated committee activity in the House. Bradley held the same position for Eric Cantor (VA) during his tenure as majority leader. Before that, he was policy director for House Republican Whip Roy Blunt (MO).

After leaving Capitol Hill, Bradley founded Chartwell Policy Solutions, LLC, a research, analysis, and advisory firm focused on public policy issues.

While working on Capitol Hill, Bradley was regularly named to Roll Call's list of 50 top congressional staffers. The Hill recognized Bradley on its list of top lobbyists, and the Washingtonian magazine listed him as one of the Most Influential People in Washington.

Bradley serves on numerous boards, including the advisory board for the McCourt School of Public Policy at Georgetown University; the board of the Convergence Center for Policy Resolution; and the board for the Center for International Private Enterprise, where he is president and permanent secretary.

Bradley, a graduate of Georgetown University, resides in Chevy Chase, Maryland, with his wife, Kiki, and their son, Peter. He is a native of Sapulpa, Oklahoma.



**Rob Engstrom, Chief Political Strategist, American Bankers Association**

Rob Engstrom has served as Chief Political Strategist to some of the nation's leading trade associations and corporations, spearheading strategic advocacy and political engagement operations, including political action committees, grassroots efforts, and voter education initiatives.

Rob is the Founder and CEO of Wolfe Street Partners, a full-service strategic advocacy firm that advises trade associations, corporations, and state and local chambers of commerce. He is a regular speaker on political and advocacy issues for a range of audiences and has traveled to all 50 states forming lasting partnerships with key business, industry, and political leaders. Rob served as Chief Political Strategist at the American Bankers Association from 2017 to 2022 and remains as a senior advisor. Previously, Rob served in a variety of capacities at the U.S. Chamber of Commerce for nearly 20 years starting in 2002, most recently as a senior advisor, senior vice president, and national political director. Leading the group's national political, grassroots, and election-related activities, he was the Chamber's chief liaison to more than 2,000 state and local chambers of commerce and trade associations. He also served as Senior Vice President of Political and State Affairs for the U.S. Chamber Institute for Legal Reform, where he directed all state-level voter education, grassroots, coalition building, and advocacy efforts. Rob has served on the boards of the National Association of State Chambers, Public Affairs Council, ALEC, and the Association of Chamber of Commerce Executives. Earlier in his career, Rob worked as Director of Political Education at the Republican National Committee, serving on the Florida Recount in 2000 in six counties, and on Speaker Gingrich's campaign. He has extensive campaign experience and was recognized by Campaigns & Elections magazine as one of the Top 50 Influencers in the 2014 election. In 2009, Rob was recognized as a Rising Star by the same magazine. Rob lives in Alexandria, VA with his wife Celina, and their two young children.



### **Luke Bernstein, President & CEO, PA Chamber of Business and Industry**

Luke Bernstein is president and CEO of the Pennsylvania Chamber of Business and Industry. A seasoned financial, government, and public policy professional, Luke came to the organization in 2022 with more than 20 years of experience in the public and private sectors.

Before leading the PA Chamber, Luke was most recently executive vice president, chief operations and technology officer at Orrstown Financial Services. He had served as Orrstown's corporate spokesperson since 2017.

He was previously senior vice president of external affairs at the Pennsylvania Bankers Association from 2015 to 2017 and deputy chief of staff for former Pennsylvania Gov. Tom Corbett from 2011 to 2015.

In addition to his executive leadership roles in the private sector and state government, Luke has experience working at the federal level, as a former appointed advisor in the Administration of President George W. Bush and as an aide in the U.S. Senate. He holds a bachelor's degree in political science and policy studies from Dickinson College, where he also served as an adjunct professor.

Luke also completed the Duke Leadership Program at Duke University's Fuqua School of Business. He is a very active member of his community, serving on numerous boards and as a youth sports coach.



### **Duncan Campbell, President & CEO, Pennsylvania Bankers Association**

Duncan Campbell has served as the Pennsylvania Bankers Association's (PA Bankers') president & CEO since 2012. Mr. Campbell maintains management responsibility for leading and furthering PA Bankers' mission of being a leading financial services trade association, dedicated to strengthening institutions of all sizes through advocacy, education, leadership and member relations.

Prior to joining PA Bankers, Mr. Campbell served as managing director of operations for Ridge Global, the international security, risk management and business consulting firm founded by Tom Ridge, the first Secretary of Homeland Security and the 43rd Governor of Pennsylvania. In this capacity, he led the firm's business operations to include client management, business development and administration.

An experienced executive in both the private and public sectors, Mr. Campbell co-founded The Pennant Group, a homeland security advisory firm, in 2005. Before that, he served as chief of staff to Secretary Ridge at the U.S. Department of Homeland Security (DHS). As a principal advisor to the Secretary, he engaged key national and international stakeholders in DHS policies and operations, threat communications and interagency planning.

Prior to his time at the Department of Homeland Security, Mr. Campbell was the director of intergovernmental affairs for the White House Office of Homeland Security, where he served as the primary liaison to the nation's state and local public officials for homeland security issues. Mr. Campbell also led the Republican Governors Association as executive director and served as deputy chief of staff to the Governor and director of the Governor's Office of Labor-Management Cooperation during the Ridge Administration.

Mr. Campbell is the immediate past chair of the Alliance of State Bankers Associations, and he serves as a member of the Stonier Graduate School of Banking Advisory Board. He earned a Bachelor of Arts in Government and History from Cornell University and resides in Hershey with his wife and two sons.



### **Allison Coccia, Director of Political Engagement, PA Chamber of Business and Industry**

Allison Coccia serves as the PA Chamber's Director of Political Engagement on the Government Affairs team. She helped lead efforts for the recent state tax reform package that included a historic reduction of the corporate net income tax rate, and is responsible for the management of ChamberPAC, and the political arm of the PA Chamber.

Previously Allison worked for five years as the Director of Government Relations for the Pennsylvania Association of Community Bankers; served as Regional Political Director for the Republican National Committee, National Finance Director and Director of the Young Guns program at the National Republican Congressional Committee for former US House Republican Majority Leader Eric Cantor; executive director for two state political parties, and managed or advised numerous political campaigns from Presidential and Federal through State and Local levels, including eleven Pennsylvania State House races.



### **Dave DeFazio, Partner, StrategyCorps**

Highly acclaimed economic prognosticator, StrategyCorps Partner Dave DeFazio, will offer a deep dive into Pennsylvania's future potential for growth and job creation. DeFazio's extensive financial services experience and expertise in data, marketing, and technology make him a leader in innovation and profitability in the ever-changing, mobile-centric global economy.