



2:00 p.m., February 28, 2024

Financial Sector Advisory Council Meeting

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| 2:00 pm | <i>10 min</i> Welcome by Lorie Logan, Sam Schulhofer-Wohl and Dawn Fitzpatrick, and introductions by new council members |
| 2:10 pm | <i>80 min</i> Group discussion to begin with selected Council members sharing their views on the following topics: <ul style="list-style-type: none">• What is your outlook for the U.S. macroeconomy, the path of the federal funds rate target range, and the normalization of the Federal Reserve's balance sheet? What are the key risks to that outlook? How are the stance of monetary policy and the runoff of Federal Reserve asset holdings influencing prices and liquidity conditions in asset and funding markets?• How are the interest rate outlook and the evolving value of different types of real estate assets affecting the availability of real estate financing and the health of financial institutions that lend against real estate? What are the key differences and commonalities across different real estate sub-sectors such as conventional mortgages, affordable housing, and various classes of commercial real estate? |
| 3:30 pm | <i>25 min</i> Group discussion on the following topic: <ul style="list-style-type: none">• What other risks in the financial system and markets are you focused on that we have not discussed today? |
| 3:55 pm | <i>5 min</i> Closing remarks by Lorie Logan, Sam Schulhofer-Wohl and Dawn Fitzpatrick |
| 4:00 pm | Adjourn |