

# 35<sup>th</sup> ANNUAL MBAAL CONVENTION SCHEDULE

## APRIL 30<sup>TH</sup> AND MAY 1, 2019

### CONVENTION SCHEDULE – APRIL 30<sup>TH</sup>

#### GOLF TOURNAMENT

Riverchase Country Club, 2000 Club Road, Hoover, AL 35244

TUESDAY, APRIL 30, 2019 - 8:30 AM - (SHOTGUN START 9:00 AM)

#### EDUCATION SCHEDULE - April 30th

#### HYATT REGENCY/GALLERIA, HOOVER, ALABAMA

9:30 – 11:00

FBI

Riverchase A

**Speaker:** Darren J. Mott, Supervisor Special Agent Squad

**Topic Description:** Current trends in cyber security and fraud. “What you need to know now and in 2020 to avoid being on ABC’s 20/20

**Who Should Attend?** CEOs, Branch or Sales Managers, Compliance Personnel, Quality Control/Assurance Personnel, Auditors, Originators, Processors, Underwriters, Closers

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11:00 – 12:30

Lunch (On Your Own)

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12:30 – 2:30

HUD Update

Riverchase A

**Speaker:** Dan Rogers

**Topic Description:** “still do not have” will get to you as soon as I can.

**Who Should Attend?** Compliance Personnel, Quality Control/Assurance Personnel, Auditors, Originators, Processors, Underwriters, Closers

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2:45 – 5:00

Connect to Close

Riverchase A

**Speaker:** Susan Walsh

**Topic Description:** How do you get more referrals, fuel your pipeline and close more quickly in today’s competitive market? Industry experts say the key is your ability to make connections with people and to foster deeper relationships. Research will tell us your Emotional Intelligence is a driving factor in your ability to do this! In this interactive session, you will gain a deeper understanding of EI and the critical role it plays in creating the right connections with your customers and referral sources. You will leave armed with the industry’s vest tips and tools to help you strengthen your relationships, increase your communication capability and laser focus on language that builds trust.

**Who should attend?** Loan Officers, Sales Professionals and Sales Leaders

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5:30 – 8:30

## “CASINO ROYALE” Cocktail Reception

### **CONVENTION SCHEDULE – MAY 1<sup>st</sup>**

#### **HYATT REGENCY/GALLERIA, HOOVER, ALABAMA**

7:00 – 8:00 am

**CEO Breakfast (Invitation Only)**

**Wynfrey D & E**

**“Captain’s Table” Sponsored by Alabama Housing Finance Authority**

**Speaker:** Mike Ceppetelli, Executive Strategic Accounts, CoreLogic

**Speaker:** John Merrill, Alabama Secretary of State

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**“The Marketplace”**

**Pre-Function Area**

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8:30 – 9:30 AM

**Opening Session for All Attendees**

**Wynfrey A & B**

**“Bon Voyage” Sponsored by FirstBank Mortgage**

**Speaker:** Steve Richman, Genworth

**Who Should Attend?** Everyone (All Convention Attendees)

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9:30 – 9:45 AM

**Break & Refreshments**

**Pre-Function Area**

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9:45 – 10:45 AM

**Session I — Concurrent Education Sessions**

**Option 1:**

**Mortgage Loan Servicing Update**

**Wynfrey A & B**

**Speakers:** Robert Parker, Sr. VP and Mortgage Servicing Manager, Trustmark National Bank  
Regina Richardson, Chief Credit and Risk Officer, Trustmark National Bank

**Topic Description:** The Mortgage Lender and The Mortgage Servicer - *“and the twain shall meet.”*

A mortgage lender loans the money for a home to borrowers and a mortgage servicer handles the daily functions of a mortgage and usually that’s where the mortgage story ends. However, the mortgage industry has experienced significant changes over the last decade. The financial crisis heightened the expectations that regulators, investors, and consumers have of mortgage lenders and servicers.

Mortgage Production and Servicing teams have learned to not let the mortgage story end, but to write another chapter by working together to meet the regulators, investors, and customer’s expectations by improving mutual technology, processes, and customer options. By mutually working together as a team, the mortgage loan officer and servicing associate have been able to obtain new business, retain existing customers and most importantly, keep the customer informed and happy!

**Who Should Attend?** Mortgage Loan Servicing: Service Managers, Supervisors, Compliance and Clerical Staff

**Option 2:**

**Freddie Mac – Current Policies**

**Riverchase A**

**AHFAs Updated Convention Set-Up**

**Freddie Mac Speaker:** TBD

**FM Topic:** Updates and Focus to include new technology to enhance the mortgage process and new programs/pilots.

**AHFA Speaker:** Cathy James, Alabama Housing Finance Authority

**AHFA Topic Description:** This session will provide information on AHFAs UPDATED conventional Step Up product and the Affordable Income Subsidy grant available to eligible borrowers meeting Freddie Mac’s

define AMI limits. The session will also discuss the program parameters, the reservation process and FAQs.

**Who Should Attend?** CEOs, Branch or Sales Managers, Compliance Personnel, Quality Control/Assurance Personnel, Auditors, Originators, Processors, Underwriters, Closers

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**11:00 AM – 1:00 PM “PORT OF CALL” - INSTALLATION LUNCHEON** **Wynfrey C,D & E**  
**Keynote Speaker: Christopher M. George, National MBA Chair**

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**1:15 PM – 2:15 PM Session II – Concurrent Education Sessions**

**Option 1: Washington DC Update**

**Wynfrey A & B**

**Speaker:** Rob Couch, Bradley Arant Boult Cummings, LLC

**Topic Description:** “What’s happening in DC?”

**Who Should Attend?** CEOs, Branch Managers, Sales Mangers, Compliance and Quality Control

**Option 2: Essent**

**Riverchase A**

**Moderator:** Jeannie Sosebee, Synovus Mortgage Corp.

**Speaker:** Roger Isley, Essent Guaranty

**Topic:** LinkedIn Training

**Topic Description:** Selling Skills – Walks you through the components of complete profile and shows you how to use LinkedIn as a powerful networking and sales tool.

**Who Should Attend?** Originators, Branch and Sales Managers, Compliance Personnel

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**2:15 – 2:30 PM**

**Break & Refreshments -**

**Pre-Function Area**

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**2:30 – 3:30 PM Session III – Concurrent Education Sessions**

**Option 1: Underwriting Panel**

**Wynfrey A & B**

**Speakers:** Amy Milner, Radian Guaranty; Wendy Beacham, Synovus Mortgage; Mindy Hill, Iberia Bank; and Tammie Gravlee, FirstBank

**Topic Description:** A lively open Roundtable discussion with an experienced panel of mortgage professionals to answer frequently asked questions and scenarios of today’s mortgage borrower.

**Who Should Attend?** CEOs, Branch or Sales Managers, Compliance Personnel, Quality Control/Assurance Personnel, Auditors, Originators, Processors, Underwriters, Closers

**Option 2: CoreLogic**

**Riverchase A**

**Speaker:** Sapan Bafna, Sr.

**Topic Description:** Workflow Technology and Robotics process Automation to increase productivity, efficiency, and quality.

**Who Should Attend?** IT Managers & Personnel, CEOs, Branch & Sales Mangers, Compliance, and Originators

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**3:30 – 4:30 PM**      **Session IV – Concurrent Education Sessions**

**Option 1: Digital Mortgage: They're here. Now.**

**Riverchase A**

**Speakers:**

Charles Moore, Bradley Arant Boult Cummings, LLC

Brian Webster, SVP Digital Innovation & Insights – Wells Fargo Home Lending

Rick Triola, President and CEO – Notary Cam, EClose 360

Donnie Martin, EVP Director of Warehouse Lending; Texas Capital Bank

Geno Yoscovitz, Director State Government Affairs – Quicken Loans

**Topic Description:** Remember all those conversations you've been a part of about the various hurdles standing between the starting blocks and the finish line of digital mortgage implementation? Be ready to engage in a new dialogue, because progress is being made! A panel of industry experts will share with you how they implemented digital mortgages and how you can too! Prepare questions – or just be ready to learn – about closing a digital mortgage, investors and warehouse lenders purchasing and funding eNotes, the legal aspects of a digital mortgage, and the technology necessary to move your business forward.

**Who should attend?** IT Managers & Personnel, CEOs, Branch & Sales Managers, Compliance, Quality Control, Post Closing, Closing Managers, Secondary Marketing, Loan Delivery and Originators

**Option 2: Ten Tips That Turn the Tide in Your Favor**

**Wynfrey A & B**

**Speaker:** Blaine Rada, Arch MI

**Topic Description:** Seizing Market Share in a Purchase Market – Creating Separation between You and Your Competitors.

**Who Should Attend?** Branch and Sales Managers, Originators, Compliance and Marketing Personnel

**CONVENTION ENDS**

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