

Commercial/Multifamily Finance Servicing and Technology Conference

Sunday, May 19, 2024

3:00 PM - 4:00 PM **CRE Legal Council Meeting**

3:00 PM - 6:00 PM **Registration**

4:00 PM - 5:00 PM **CCMS Society Meeting**

4:30 PM - 5:30 PM **mPact Servicing Reception**

5:00 PM - 6:00 PM **CCMS Society Reception**

Monday, May 20, 2024

7:30 AM - 8:00 AM **Continental Breakfast in the Exhibit Area**

7:30 AM - 5:30 PM **Exhibit Area Open**

7:30 AM - 5:30 PM **Registration**

8:00 AM - 9:45 AM

OPENING GENERAL SESSION: Market Outlook

After opening remarks on the commercial/multifamily real estate finance landscape from MBA's 2024 Vice-Chair and Executive Vice President, Chief Credit Officer and Chief Operating Officer of M&T Realty Capital Corporation, Christine Chandler, hear from MBA's AVP of Commercial Research, Reggie Booker, and Head of Commercial Real Estate Research, Jamie Woodwell as they discuss the latest on the economy and the CRE marketplace, with a special focus on issues of importance to commercial mortgage servicers. This session provides a forecast you can't afford to miss, and helps you understand where the markets are and where they are heading. This session also celebrates the newest recipients of the Commercial Certified Mortgage Servicer (CCMS) designation. Sponsored by PNC Real Estate

Speakers

Reggie Booker, *Associate Vice President, Commercial Research, Mortgage Bankers Association*

Christine R Chandler, *2024 MBA Vice-Chair; Executive Vice President, Chief Credit Officer & Chief Operating Officer, M&T Realty Capital Corporation*

Jamie R. Woodwell, *Vice President, Head of Commercial Real Estate Research, Mortgage Bankers Association*

9:45 AM - 10:00 AM

Refreshment Break in the Exhibit Area

10:00 AM - 10:50 AM

GENERAL SESSION: Servicing in the Current Market

Join Christine Chandler, along with a panel of industry experts, as they delve deeply into the intricate dynamics of rate fluctuations, maturities, and various other critical market conditions. Through insightful discussions and comprehensive analysis, gain valuable insights into the factors shaping today's financial landscape and discover strategies to navigate through evolving market trends with confidence and expertise.

Speakers

Christine R Chandler, *2024 MBA Vice-Chair; Executive Vice President, Chief Credit Officer & Chief Operating Officer, M&T Realty Capital Corporation*

Adam Fox, *Senior Director, Fitch Ratings*

Brian L. Hanson, *Managing Director, CWC Capital Asset Management LLC*

Carina Johnson, *Senior Vice President, Walker & Dunlop, LLC*

Stephanie T. Milner, *Associate Vice President, Head of Commercial and Multifamily Policy, Mortgage Bankers Association*

Jamie R. Woodwell, *Vice President, Head of Commercial Real Estate Research, Mortgage Bankers Association*

11:00 AM - 12:00 PM

BREAKOUT SESSION: Challenges of Property Conditions & Inspections

Inconsistencies around maintenance and inspection requirements make servicing loans a nuisance. A panel of experts will discuss ideas on how to adhere to the new requirements to ensure property health and safety standards are met.

Speakers

Jonelle Faal, *Vice President, Asset Management, SitusAMC*

Megan McConville, *Director - CMS Asset Management, Principal Real Estate*

11:00 AM - 12:00 PM

BREAKOUT SESSION: Insurance Exception Requests Best Practices

Lenders continue to increase their scrutiny on insurance waiver requests, leaving Servicers managing the borrower's expectations. This session will walk through a complex waiver case study from beginning to end, including the use of risk modeling.

Speaker

Misty Leeth, *Managing Director - Insurance and Loan Servicing, Newmark*

11:00 AM - 12:00 PM

BREAKOUT SESSION: Managing Increasing Compliance Requirements

Monitoring and managing compliance requirements at the loan and servicing contract level while tracking

numerous covenants and triggers can get tricky. Improper management can leave the Servicer exposed to audit findings or penalties. Join this panel for best practices in managing all the moving pieces to ensure the Servicer stays compliant.

Speakers

Stacy G. Ackermann, *Partner, K&L Gates, LLP*

Sally Ingberg, *SVP, Director-Asset Management-Agency, BWE*

Victoria Kratzberg, *AVP, Operations Manager II, PNC Real Estate*

11:00 AM - 12:00 PM

Loan Closers Committee Meeting

12:00 PM - 1:00 PM

Networking Lunch in the Exhibit Area

1:00 PM - 2:00 PM

BREAKOUT SESSION: Loan Servicing Reimagined - Technology, Process, and Connectivity

This session offers a forward-looking perspective on modernizing loan servicing and Asset Management operations. The panelists will delve into the intersection of technology, process, data granularity, and connectivity, highlighting their critical role in reimagining loan servicing efficiency and compliance.

Speakers

Sharena Daniel, *JLL/T Product Management, JLL Capital Markets*

James Flake, *Senior Vice President, Head of Multifamily Asset Management, Capital One Commercial Real Estate*

Justin Lincoln, *Senior Loan Portfolio Analyst, Ameritas Investment Partners*

Daniel Linder, *Managing Director, Head of Revenue, RealINSIGHT*

Richard Marion, *CCMS, Senior Vice President, M&T Realty Capital Corporation*

1:00 PM - 2:00 PM

BREAKOUT SESSION: The Effects of Valuations and Borrower Financial Challenges to DSCR

Join the conversation discussing the effects of valuations and borrower financial challenges driving the DSCR below thresholds and learn Servicer's best practices.

Speakers

James Gaffney, Jr., *Senior Managing Director - Head of Servicing & Asset Management, Newmark*

Brian Pounds, *Vice President - Senior Manager of Portfolio & Asset Management, Northmarq*

Leslie Schultze, *Senior Director, JLL Capital Markets*

Molly Skipper Steele, *Head of Strategic Growth, Apprise by Walker & Dunlop*

Michael A. Tilden, *Senior Manager, CMBS Portfolio Services, Key Commercial Bank & Real Estate Capital, KeyCorp*

1:00 PM - 2:30 PM

FHA Servicers Roundtable

1:00 PM - 2:00 PM

Small Servicers Committee Meeting

2:15 PM - 3:15 PM

GENERAL SESSION: Cybersecurity - The Bad Guys Are Looking for Opportunities

The FBI director recently warned Congress that hackers are preparing to wreak havoc on critical components of US infrastructure – this includes financial services. For the mortgage industry, successful attacks have already occurred, resulting in debilitating impact to companies. These risks are real, and the rewards are high for successful attacks. But there are specific actions you and your company can take to reduce the opportunities for the bad guys.

Speakers

Brett E. Adams, *SVP-Managing Director-Servicing, Berkadia*

Michael Nougier, *Chief Information Security Officer, Richey May*

3:15 PM - 3:30 PM

Refreshment Break in the Exhibit Area

3:30 PM - 4:30 PM

BREAKOUT SESSION: Brace Yourselves - Impact of Increased Loan Defaults and Decreased Valuations

Rumors of a downturn have circulated for the last two years. Join Servicers and Special Servicers as they discuss best practices to prepare for declining appraisal values and defaulting loans.

Speakers

Dale Becker, *Director, FHA/USDA Asset Management - Agency Risk, Lument*

Mike Jenkins, *Senior Vice President, Key Commercial Bank & Real Estate Capital, KeyCorp*

Chuck Ryba, *SMD and Head of Asset Management, NewPoint Real Estate Capital*

Katie Schwarting, *Firmwide Board Member, Seyfarth Shaw LLP*

3:30 PM - 4:30 PM

BREAKOUT SESSION: Investor Reporting Best Practices within an Organization

Complex loans require in-depth investor reporting. Join investor reporting experts as they discuss the evolution of reporting needs to meet investor requirements and the need for improved interdepartmental communication and technology.

Speakers

Audrey Brann, *Vice President, Servicing, Walker & Dunlop, LLC*

Nicole Denis, *Investor Accounting Manager, JLL Capital Markets*

Melanie Follstaedt, *Investor Accounting Manager, Colliers Mortgage*

3:30 PM - 4:30 PM

BREAKOUT SESSION: Transforming Servicing Operations - Leveraging Artificial Intelligence &

Intelligent Automation

Artificial intelligence (AI) and intelligent automation (IA) are common themes that are increasingly emerging in servicing discussions; however, it can be difficult to define those terms, understand how they are applicable to servicing, and conceptualize how to practically and sustainably implement into operations. Hear from a panel of experts to understand the basics of intelligent automation, how they are being used by peers today, and best practices for identifying use cases.

Speakers

Laura Krashakova, *Chief Executive Officer, Smart Capital*

Bob Wright, CMB, CCMS, *Managing Director, Precision LM, SS&C Technologies, Inc.*

3:30 PM - 4:30 PM

Operations Committee Meeting (Open to Members; Closed to Media)

Join us to delve into hot topics, gain insights from guest speakers, and exchange ideas regarding commercial real estate servicing. Servicing professionals involved in all facets of servicing operations are welcome to attend this meeting.

4:30 PM - 5:30 PM

Opening Reception in the Exhibit Area - French Quarter Fete

5:30 PM - 6:30 PM

Servicing Senior Executive Reception

Tuesday, May 21, 2024

7:30 AM - 5:30 PM

Registration

8:00 AM - 8:30 AM

Continental Breakfast in the Exhibit Area

8:00 AM - 3:30 PM

Exhibit Area Open

8:30 AM - 9:30 AM

GENERAL SESSION

9:30 AM - 9:45 AM

Refreshment Break in the Exhibit Area

9:45 AM - 10:45 AM

Asset Management Committee Meeting (Open to Members; Closed to Media)

MBA members specializing in asset management, capital improvements, covenant tracking, property inspections, property management, rent rolls, or tenant relationships are invited to join us for networking with peers and hear insights from industry experts.

9:45 AM - 10:45 AM

BREAKOUT SESSION: Evolution of Insurance Compliance Reviews and Technology

Join us for an insightful exploration into the dynamic landscape of insurance compliance reviews and the transformative role of technology in shaping its evolution. In this session, we delve deep into the challenges, innovations, and opportunities driving the industry forward.

Speakers

Ashwin Agarwal, *CEO & Co-Founder, Advocate Technologies*

Laura Bushey, *Vice President, Insurance, Berkadia*

Emily Rasmussen, *President and Chief Operating Officer, Resilience Insurance Advisory Corp.*

9:45 AM - 9:45 AM

BREAKOUT SESSION: Exploring the Interconnections of Title, Survey, and Zoning

Get valuable insights into the critical role of surveys, zoning compliance, zoning letters and reports, and title companies. Join this session to learn strategies in navigating surveys, zoning letter requirements, and title

companies.

Speakers

Jeannette Harry, *Manager, SMI Operations, StanCorp Mortgage Investors, LLC*

Luke Hoffman, *CCMS, Manager - Head of CML Closing & Servicing, TruStage*

Crystal N. Kalinowski, *CCMS, Managing Director, District Capital LLC*

9:45 AM - 10:45 AM

BREAKOUT SESSION: Show Me the Money - Effective Processes for Cash Managed Loans

This session will explore the four points of cash management, including forecasting, mobilizing and managing the cash flow, maintaining bank relations, and investing surplus cash in today's market.

Speaker

Dana Jo Martino, *CCMS, SVP - Managing Director -Servicing, Berkadia*

9:45 AM - 11:45 AM

Explore the CCMS Designation: Take a Designation Mock Exam

11:00 AM - 12:00 PM

GENERAL SESSION: Top Origination Issues for Servicers

Join your peers for a comprehensive crash course designed to equip you with the latest insights into origination issues critical for effectively servicing your borrowers throughout the loan lifecycle. Explore essential topics such as cash management structures, renewing rate caps, and a wealth of other pertinent subjects essential for success in today's dynamic lending landscape.

Speakers

Catherine Alexander, *VP, Managing Director, Commercial Mortgage Loans, Unum*

David A. Harrison, *Chief Operating Officer, PNC Real Estate*

Mike Morey, *Vice President & Managing Director, StanCorp Mortgage Investors, LLC*

Michael S. Tanner, *President, Pacific Southwest Realty Services*

Heather Wright, *Partner, Bradley*

12:00 PM - 1:30 PM

Insurance & Risk Management Committee Meeting (Open to Members; Closed to Media)

MBA members with a focus on insurance coverage assets and risk management are encouraged to join this meeting. Receive updates on the committee's work while enjoying lunch.

12:00 PM - 1:00 PM

Networking Lunch in the Exhibit Area

1:00 PM - 2:00 PM

BREAKOUT SESSION: Closing Catastrophes - War Stories and Workarounds

A discussion on the challenges and nuisances of commercial real estate loan closing. Hear from Closing professionals as they present use cases of actual closing catastrophes and the innovative workarounds and practical strategies employed for mitigating and overcoming these challenges.

Speakers

Mary Funderburk, *Vice President, Sr. Closer, Colliers Mortgage*

Rania Galan, *Partner, Ballard Spahr LLP*

Arren Goldman, Esq., *Partner, Seyfarth Shaw LLP*

Velinda Maxwell, *Vice President, Walker & Dunlop, LLC*

1:00 PM - 2:00 PM

BREAKOUT SESSION: Garbage In - Garbage Out: Data Integrity and Business Solutions

The complexity of loan requirements demands increased controls for data integrity while new business solutions tease the ease of data mobility, monitoring, and storage. Join the robust conversation as experts debate the need for new business solutions supporting data and technology standardization.

Speakers

Kristi Dowdle, *Director, Servicing, Lument*

Michael Heagerty, *CCMS, CFO - Principal, Gantry*

Denise F. Ross, *Chief Operating Officer, McCracken Financial Solutions Corp.*

Lyle C. Shapland, *Senior Vice President, PNC Real Estate*

Steven Smith, *Chief Executive Officer, Basecap Analytics*

1:00 PM - 2:00 PM

BREAKOUT SESSION: Digging “Deeper than a Hollar” into Loan Modifications & Special Servicing

Speakers

Elizabeth E. Burnett, *CCMS, Managing Director, Loan Servicing, Slatt Capital*

Saadia Ghazi, *Partner, Seyfarth Shaw LLP*

Christina Hayhow, *Senior Operations Manager, Midland Loan Services*

Jerry Smith, *Principal & President, Citrine Advisors*

2:15 PM - 3:15 PM

GENERAL SESSION: To Infinity and Beyond - Defining the Future Servicing Workforce

Join your peers for an engaging discussion on the impact of remote and hybrid teams on team engagement, professional growth, and their effects on workforce and leadership development. Explore the challenges and opportunities presented by these evolving work structures, and gain valuable insights into strategies for fostering team cohesion, nurturing individual growth, and cultivating effective leadership in a changing landscape.

Speakers

Charlotte Croog, *Senior Director- Escrow Operations, JLL Capital Markets*

Paula Williams Jackson, *CCMS, Vice President, Chief Asset Manager, Manager of Asset Management, BWE*

Richard Pardoe, CCMS, *Senior Vice President, Asset Management, M&T Realty Capital Corporation*

Chris Shamaly, *Executive Managing Director, CBRE Capital Markets*

Rosie Sheehan, *Director, Business Development, SS&C Technologies, Inc.*

Lindsay Tarwater, *Executive Director, WLS Real Estate – Agency Multifamily Servicing, JP Morgan Chase*

3:00 PM - 4:00 PM

Servicing Senior Executives & COMBOG Member Roundtable

3:30 PM - 4:30 PM

BREAKOUT SESSION: Investor Reporting & Account Management

The complexity of reporting requirements to investors and master services grows with bank collapses, FDIC insured limits, and technology demands. Hear industry peers as they discuss how they ensure data integrity while meeting the evolving demands.

Speakers

Keith A. Kehlbeck, CCMS, *Executive Director, Investment Operations, PGIM Real Estate*

Sara Litton, *Controller & Servicing Director, Gantry*

Bob Watson, *Senior Vice President - Servicing, Walker & Dunlop, LLC*

3:30 PM - 4:30 PM

BREAKOUT SESSION: Silver Linings - Combating Borrower Challenges with Winning Solutions

Borrowers continue to report challenges with staying ahead of property maintenance, paying taxes and insurance, and tenant renewals. Join the conversation with Servicers as they discuss the challenges borrowers present created by the current market conditions and recommended resolutions.

Speakers

Will Hasselmann, *Vice President , Operations Manager, Grandbridge Real Estate Capital LLC*

Laura Johnson, *Asst. Director Commercial Loan Operations, Principal Real Estate*

Jay Smith, *Director, Lument*

3:30 PM - 4:30 PM

BREAKOUT SESSION: Evolution of Capital Sources & Asset Classes and the Impacts to Servicers

Dedicate an hour to delve into the state of the industry across different asset classes. Explore untapped opportunities such as the medical use of office space, potential retail growth, and emerging hotel sector trends. Identify preferred asset classes from the investors' perspective and examine how these preferences influence servicers.

Speakers

Sharon Briskman, *Executive Vice President, Greystone*

Derek Vander Veen, CCMS, CRI®, *Business Development Manager, Grandbridge Real Estate Capital LLC*

4:30 PM - 6:00 PM

mPower Event: Clear Boundaries - Safety Tips for Business Women

Real Estate remains the #1 most violent crime victim of perpetrators in America and as partners to Realtors and all of us in and out of similar unsafe places with similar interactions with possible predators, the information has proven to be life-saving to our own professionals in the past three years. This book is also dedicated and inspired by two of my colleagues over the span of 30 years who were murdered. Both women's images are shared in this presentation and their stories are told as part of this book's emotional pull to evoke top of mind awareness around creating proper safety boundaries.

Speaker

Christine Beckwith, *Chief Executive Officer, 20/20 Vision for Success Coaching & Consulting*

Wednesday, May 22, 2024

8:00 AM - 10:30 AM

Registration

8:30 AM - 9:00 AM

Continental Breakfast

9:00 AM - 10:30 AM

Commercial/Multifamily Super Session (Closed to Media)

Join your colleagues at the Super Session for a dynamic discussion on the current issues in Commercial/Multifamily Servicing. Bring your comments and questions regarding today's industry hot topics. This interactive session serves as an excellent forum to recap the week's learning. Feel free to attend in your travel attire and participate for as long as your schedule permits.

Speakers

Joni Brown-Haas, CCMS, *Managing Director, PGIM Real Estate*

Adam Fox, *Senior Director, Fitch Ratings*

David A. Harrison, *Chief Operating Officer, PNC Real Estate*

Steven R. Johnson, *Managing Director of Closing and Servicing, Principal Real Estate*

Emily Rasmussen, *President and Chief Operating Officer, Resilience Insurance Advisory Corp.*

Katie Schwarting, *Firmwide Board Member, Seyfarth Shaw LLP*