

# Commercial/Multifamily Finance Servicing and Technology Conference

Sunday, May 18, 2025

2:00 PM - 3:00 PM

**Life Companies Mortgage Loan Servicing Managers Roundtable (Open to MBA Members; Closed to Media)**

*Location: Great Hall 6, 3rd Floor, Convention Center*

If you are a servicing executive for a life insurance company with a current MBA membership, join your peers to discuss topics related to the servicing and asset management of life company general account loans and assets.

3:00 PM - 4:00 PM

**mPact Servicing Leadership Committee Meeting (Committee Members Only)**

*Location: Conference Rooms 312-313, 3rd Floor, Hotel*

mPact is MBA's network for young professionals in the real estate finance industry. Join us at the in-person mPact Servicing Leadership Committee meeting to learn more about mPact and how you can get involved.

3:00 PM - 6:00 PM

**Registration**

*Location: Great Hall Registration Desk, 3rd Floor, Convention Center*

4:00 PM - 5:00 PM

**CCMS Designee Society Meeting (By Invitation Only)**

*Location: Great Hall 6, 3rd Floor, Convention Center*

The Commercial Certified Mortgage Servicer (CCMS) Designee society is for all graduates of the CCMS program. We encourage all designees to attend the society meeting to discuss leadership opportunities, philanthropic initiatives, and emerging issues for today's servicing and asset management professionals.

4:00 PM - 5:00 PM

**mPact Servicing Reception (Open to MBA Members; Closed to Media)**

*Location: South Palm Court, Lobby Level, Hotel*

mPact is MBA's network for young professionals in the real estate finance industry. Kick off your conference experience by connecting with your peers. Open to all attendees who are MBA members. RSVP here: <https://www.mba.org/conferences-and-education/commercial-multifamily-finance-servicing-and-technology-conference/schedule/session-detail/mpact-servicing-reception-open-to-mba-members-closed-to-media-80625>

5:30 PM - 6:30 PM

**CCMS Society Reception**

*Location: Conference Room 214, 2nd Floor Hotel*

Interested in knowing more about the Certified Commercial Mortgage Servicer designation? Drop by to mingle with designees and leaders active in this respected program. Open to all attendees who are MBA members.

6:30 PM - 7:30 PM

**Future Leaders Alumni Reception (By Invitation Only)**

*Location: Great Hall Terrace, 3rd Floor, Hotel*

Monday, May 19, 2025

6:00 AM - 7:00 AM

**MBA Runs Sunrise 5K**

*Location: The Diplomat Lobby*

Up early? Join us for MBA Runs Sunrise 5K! Set against the stunning backdrop of the beautiful South Florida beach, participants can connect with fellow industry professionals while making their way along the picturesque waterfront route. This event caters to all skill levels, whether you're a seasoned runner or casual walker. Join us bright and early for some fitness and fun in America's finest city! Meet up at 6:00 AM.

7:15 AM - 8:45 AM

**DUS Chief Asset Managers Subcommittee Meeting (By Invitation Only)**

*Location: Diplomat Ballroom 5, 2nd Floor, Convention Center*

7:30 AM - 5:30 PM

**Registration**

*Location: Great Hall Registration Desk, 3rd Floor, Convention Center*

8:00 AM - 8:30 AM

**Continental Breakfast in the Exhibit Area**

*Location: Great Hall 4, 3rd Floor, Convention Center*

Sponsored by: Althans Insurance Inc

8:00 AM - 5:30 PM

**Exhibit Area Open**

*Location: Great Hall 4, 3rd Floor, Convention Center*

8:00 AM - 5:30 PM

**Headshot Cafe**

*Location: Great Hall Foyer, 3rd Floor, Convention Center*

Stop by our professional photographer for a new headshot (complete with makeup touchup) and receive a digital file to update your social media presence. No additional fee. Sponsored by: Grandbridge

8:00 AM - 5:00 PM

**Member Services Engagement Zone**

*Location: Great Hall Foyer, 3rd Floor, Convention Center*

8:30 AM - 9:45 AM

**OPENING GENERAL SESSION: Economic and CRE Market Outlook (CPE 1.5)**

*Location: Great Hall 3, 3rd Floor, Convention Center*

Kick off the conference with opening remarks on the commercial/multifamily real estate finance landscape from MBA's 2025 Chair Elect Christine Chandler and then hear from MBA's Research and Economics team 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/Multifamily Research, Mortgage Bankers Association*

**Christine Chandler**, *2026 MBA Chair; Executive Vice President, Chief Credit Officer & Chief Operating Officer, M&T Realty Capital Corporation*

**Randy Spellins**, *Senior Vice President, Enterprise! Technology Business Director, PNC Real Estate*

**Jamie Woodwell**, *Senior Vice President of Commercial/Multifamily Policy and Strategic Industry Engagement, Mortgage Bankers Association*

9:45 AM - 10:00 AM

**Refreshment Break in the Exhibit Area**

*Location: Great Hall 4, 3rd Floor, Convention Center*

10:00 AM - 10:50 AM

**GENERAL SESSION: Understanding the Financial Impact of Servicing in Today's Lending Environment (CPE 1.0)**

*Location: Great Hall 3, 3rd Floor, Convention Center*

Servicers face increasing market and regulatory challenges that affect decision-making and portfolio performance. This cross-functional discussion will explore the interconnected effects and strategies within a Servicing shop while exploring technology adoption to support and protect the asset value. Gain actionable insights to optimize outcomes in the evolving landscape. Sponsored by: Colliers Mortgage

Speakers

**Christian Baggett**, *Director of Business Development, Essex Financial Services LLC*

**Christine Chandler**, *2026 MBA Chair; Executive Vice President, Chief Credit Officer & Chief Operating Officer, M&T Realty Capital Corporation*

**David A. Harrison**, *Chief Operating Officer, Midland Loan Services*

**Beau Jones**, *Executive Managing Director, Global Business Development, Trimont*

**Ben Larson**, *Vice President - Asset Management, Colliers Mortgage*

**Beth Plourd**, *Assistant Vice President and Senior Director, Lincoln Financial Group*

11:00 AM - 12:00 PM

**BREAKOUT SESSION: Best Practices for Closing-to-Servicing Handoff (CPE 1.2)**

*Location: Great Hall 1, 3rd Floor, Convention Center*

A smooth transition from Closing to Servicing is key to loan performance, borrower satisfaction, and operational efficiency. This session covers best practices for data integrity, document transfer, compliance, and borrower communication. Learn how to address common challenges like missing information, misaligned expectations, and servicing setup delays. Hear about stakeholder roles and enhancing collaboration to minimize risk and streamline the process. (Focus: Asset Management, Closing, Compliance, Legal, Servicing/Operations)

Speakers

**Laura L. Brooks**, *Pacific Southwest Realty Services*

**Frankie T. Jones, Jr., CCMS**, *Vice President & Managing Director, Lincoln Financial Group*

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

**Jennifer L. Shedden, CCMS, SVP**, *Senior Portfolio Manager, Colliers Mortgage*

11:00 AM - 12:00 PM

**BREAKOUT SESSION: Modern Property Inspections: Navigating Evolving Standards & Charting the Future (CPE 1.2)**

*Location: Great Hall 2, 3rd Floor, Convention Center*

As scrutiny on property condition assessments intensifies, servicers must navigate evolving guidelines to ensure compliance and mitigate risk. This session covers best practices for property condition management, strategies to prevent Reservation of Rights letters, and approaches to maintaining loan performance while maintaining good borrower relationships. In addition, we'll discuss the future of property inspections, exploring a solution that could streamline processes, improve efficiency and aid in risk mitigation. Join us to stay ahead in an increasingly demanding landscape. (Focus: Asset Management, Compliance)

Speakers

**Corey Babarovich**, *President, Strategic Property Associates/Strategic Asset Services*

**Mark C. Driscoll**, *Senior Director, Fannie Mae Multifamily*

**Lisa Lundeen**, *CCMS, EVP, Agency Asset Management, Merchants Capital Corp.*

**Charles Scott**, *CCMS, Vice President, Asset Management, PGIM*

**Anne Seehusen**, *CCMS, Vice President, Senior Manager of Portfolio and Asset Management, Northmarq*

11:00 AM - 12:00 PM

**BREAKOUT SESSION: Cracking the Code - Overcoming Investor Accounting Challenges (CPE 1.2)**

*Location: Great Hall 5, 3rd Floor, Convention Center*

Investor accounting and reporting are becoming more complex, with evolving regulations, diverse loan structures, and rising demands for accuracy and speed. This session explores key challenges—technology gaps, manual processes, staffing constraints, and coordination hurdles—and provides practical strategies to modernize reporting, improve accuracy, streamline workflows, and stay compliant in today's fast-paced environment. (Focus: Compliance, Investor Reporting/Accounting, Technology)

Speakers

**Ashley Fair**, *Vice President, Investor Reporting, Merchants Capital Corp.*

**Melanie Follstaedt**, *CCMS, Vice President, Investor Reporting, Colliers Mortgage*

**Liz Parent**, *Director - Investor Accounting*

**Erika Ricci**, *Vice President, Greystone*

11:00 AM - 12:00 PM

**Insurance and Risk Management Committee Meeting (Open to MBA Members; Closed to Media)**

*Location: Great Hall 6, 3rd Floor, Convention Center*

MBA's Insurance and Risk Management Committee is open to insurance professionals within Commercial/Multifamily servicing divisions. This committee will discuss pertinent insurance issues and concerns facing the commercial servicing/lending industry.

12:00 PM - 1:00 PM

**Advocacy Lunch and Learn (Open to all conference attendees and MAA members (Sign Up for MAA at the Door); RSVP Required)**

*Location: Meeting Room 303, 3rd Floor, Hotel*

Join the Mortgage Action Alliance (MAA) for a luncheon featuring MBA members and subject-matter experts on the vital role MBA's advocacy programs play in promoting and advancing our policy positions on key industry issues like federal support for housing, the Administration's deregulatory agenda, and more, with policymakers and elected officials. To RSVP, use this: [bit.ly/42MaQ23](https://bit.ly/42MaQ23)

12:00 PM - 1:00 PM

**Networking Lunch in the Exhibit Area**

*Location: Great Hall 4, 3rd Floor, Convention Center*

Sponsored by: RealINSIGHT

12:00 PM - 1:30 PM

**Presentation: Stancorp Open House Reception (By Invitation Only)**

*Location: Diplomat Ballroom 3, 2nd Floor, Convention Center*

1:00 PM - 2:00 PM

**BREAKOUT SESSION: Bridging the Gap - Streamlining Default Management and Servicing Transfers (CPE 1.2)**

*Location: Great Hall 1, 3rd Floor, Convention Center*

With rising default loans, efficient loan transfers between primary, master, and special servicers are more critical than ever. This session covers best practices for default management, role clarity, and effective communication and explores strategies for standardizing processes and improving efficiency in special servicing transfers. (Focus: Asset Management, Special Servicing)

Speakers

**John Collins**, *Senior Vice President of Servicing, Walker & Dunlop, LLC*

**Brandon Dornish**, *JLL Capital Markets*

**Christina Hayhow**, *CCMS, Vice President, PNC Real Estate*

**Richard White**, *Partner, Seyfarth Shaw LLP*

**Grant Winemiller**, *Vice President - Special Servicing, KeyBank Real Estate Capital*

1:00 PM - 2:00 PM

**BREAKOUT SESSION: Compliance Conundrum - Balancing Oversight, Risk, and Efficiency (CPE 1.2)**

*Location: Great Hall 5, 3rd Floor, Convention Center*

With heightened regulatory scrutiny, servicers face growing audits, reviews, and compliance demands. An expert panel examines the evolving compliance landscape, discusses strategies for managing regulatory requirements efficiently, and explores how to balance oversight with operational effectiveness in today's challenging environment. (Focus: Asset Management, Compliance, Servicing/Operations)

Speakers

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

**Claire Carpenter**, *Managing Director, Compliance, JLL Capital Markets*

**Marc McDevitt**, *Senior Director, CMBS Surveillance, Kroll Bond Rating Agency*

**Tray Terrell**, *Vice President of Operations-Servicing, Greystone*

1:00 PM - 2:00 PM

**BREAKOUT SESSION: Servicing Unconventional Asset Types (CPE 1.2)**

*Location: Great Hall 2, 3rd Floor, Convention Center*

As commercial lending evolves, servicers must adapt to non-traditional assets like solar farms, billboards, data centers, and SFR portfolios, along with complex financing structures such as Tax Credit deals and CPACE. This session explores the unique challenges of servicing these assets, from compliance to risk management, and offers insights into industry strategies for supporting this evolving market. (Focus: Closing, Compliance, Servicing/Operations)

Speakers

**Christopher Cummings**, *Managing Director, Trimont*

**Ryan Hager, CCMS**, *Senior Vice President, Account Management, PNC Real Estate*

**David Ruiz**, *Managing Director, Operations, ACORE Capital*

**Jeanne St. John, CCMS**, *Executive Director, PGIM*

1:00 PM - 2:00 PM

**Servicing Operations Committee (Open to MBA Members; Closed to Media)**

*Location: Great Hall 6, 3rd Floor, Convention Center*

MBA's Servicing Operations Committee is open to servicing professionals supporting all aspects of Commercial/Multifamily servicing operations. Join us to discuss the impact of escrow analysis, tech needs in servicing, and the next generation of leaders.

1:30 PM - 3:00 PM

**FHA Servicers Roundtable (Open to MBA Members; Closed to Media)**

*Location: Diplomat Ballroom 1, 2nd Floor, Convention Center*

Join us for a discussion with staff from HUD's Office of Multifamily as well as the Office of Residential Care Facilities. Topics will include NSPIRE inspections, 10-year PCNAs, subordinate liens at assignment, Servicing Handbook, Risk Surveillance Dashboard, and Completion of Repairs. There will also be ample time for open Q&A.

2:15 PM - 3:15 PM

**GENERAL SESSION: 2025 Insurance Outlook - Trends, Challenges, and Market Drivers (CPE 1.2)**

*Location: Great Hall 3, 3rd Floor, Convention Center*

As the insurance market evolves, factors like loss data and reinsurance trends are shaping coverage, pricing, and availability. This session explores the key drivers influencing the 2025 insurance landscape and provides insights on how servicers, lenders, and asset managers can adapt to the changing market.

Speakers

**Laura Bushey**, *Vice President, Manager - Insurance, Berkadia*

**Gretchan Francis**, *Managing Director, InsureMAC Financial Insurance Services*

**JulieAnne Lally, CIC**, *Real Estate Practice Leader, Principal, Senior Vice President, Property Broker,*



*Brown & Riding*

**Nicole Malaske**, *Executive Director, Flood & Insurance Center of Excellence, JP Morgan Chase*

**Michael R. Smith**, *EVP, Specialty Lending, Alliant Insurance Services, Inc.*

3:15 PM - 3:30 PM

**Refreshment Break in the Exhibit Area**

*Location: Great Hall 4, 3rd Floor, Convention Center*

3:30 PM - 4:30 PM

**BREAKOUT SESSION: Building a Versatile Workforce - Developing Adaptable Skills (CPE 1.2)**

*Location: Great Hall 5, 3rd Floor, Convention Center*

In commercial real estate servicing, cross-functional expertise is essential for navigating evolving market demands. Hear how servicers can identify and develop interchangeable skills to create a resilient, adaptable workforce ready to tackle shifting roles and responsibilities. (Focus: Leadership, All Areas)

Speakers

**Brett E. Adams**, *Senior Managing Director - Chief Servicing Officer, Berkadia*

**Bert Libke**, *Senior Vice President/Managing Director, Loan Servicing, Northmarq*

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

**Christina Legree Morrison**, *VP, Director of Asset Management, The Community Preservation Corporation*

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

3:30 PM - 4:30 PM

**BREAKOUT SESSION: Leveraging Digital Solutions to Manage Delinquency and Climate Risks (CPE 1.2)**

*Location: Great Hall 1, 3rd Floor, Convention Center*

With growing tax delinquencies and climate-related threats to asset values, servicers must adopt automated solutions to track payments, identify delinquencies, and mitigate risks. This session explores how digital tools can help lenders and servicers manage tax burdens, protect assets, and build long-term portfolio resilience amid economic and environmental challenges. (Focus: Escrow/Taxes, Servicing/Operations, Technology)

Speakers

**Sara Anzinger**, *SVP, Strategy and Capital Markets, Measurabl*

**George Gallagher**, *Senior Principal - Market Lead: Government & Capital Markets, Cotality*

**Derek Vander Veen**, **CCMS, CRI®**, *Senior Vice President of Business Development, Grandbridge Real Estate Capital LLC*

**Heather Wright**, *Shareholder, Buchalter*

3:30 PM - 4:30 PM

**BREAKOUT SESSION: Valuations and Non-Recoverability - Assessing Distressed Assets (CPE 1.2)**

*Location: Great Hall 2, 3rd Floor, Convention Center*

With distressed assets posing ongoing challenges, accurately valuing properties and assessing non-recoverability is crucial for servicers and lenders. This session examines strategies for evaluating distressed loans, forecasting losses, and making informed recovery decisions to mitigate risk and maximize asset value. (Focus: Asset Management, Legal, Special Servicing)

Speakers

**Julie Lange**, **CCMS**, *Sr. Mortgage Portfolio Advisor, Securian Financial*

**Kathleen Mylod**, *Partner, Dechert LLP*

**Jay Puckett**, **CCMS**, *Senior Managing Director, Trimont*

**Drew Simms**, **CCMS**, *Managing Director Credit Portfolio Management, Trimont*

**Kevin Sullivan**, **CCMS**, *Senior Managing Director, JLL Capital Markets*

3:30 PM - 4:30 PM

**Closing Committee Meeting (Open to MBA Members; Closed to Media)**

*Location: Great Hall 6, 3rd Floor, Convention Center*

4:30 PM - 5:30 PM

**Opening Reception in the Exhibit Area - Sunshine State Social**

*Location: Great Hall 4, 3rd Floor, Convention Center*

Tuesday, May 20, 2025

7:30 AM - 8:30 AM

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

*Location: Great Hall 6, 3rd Floor, Convention Center*

7:30 AM - 4:30 PM

**Registration**

*Location: Great Hall Registration Desk, 3rd Floor, Convention Center*

8:00 AM - 8:30 AM

**Continental Breakfast in the Exhibit Area**

*Location: Great Hall 4, 3rd Floor, Convention Center*

Sponsored by: Bellwether Enterprise

8:00 AM - 3:30 PM

**Exhibit Area Open**

*Location: Great Hall 4, 3rd Floor, Convention Center*

8:00 AM - 5:30 PM

**Headshot Cafe**

*Location: Great Hall Foyer, 3rd Floor, Convention Center*

Stop by our professional photographer for a new headshot (complete with makeup touchup) and receive a digital file to update your social media presence. No additional fee. Sponsored by: Grandbridge

8:00 AM - 5:00 PM

**Member Services Engagement Zone**

*Location: Great Hall Foyer, 3rd Floor, Convention Center*

8:30 AM - 9:30 AM

**GENERAL SESSION: AI Policy and Ethics - Navigating AI's Role in Commercial Real Estate (CPE 1.2)**

*Location: Great Hall 3, 3rd Floor, Convention Center*

Artificial Intelligence (AI) is reshaping industries, but its adoption raises key ethical and policy questions. This session explores AI's real-world applications in commercial real estate, separating fact from hype while examining legal considerations, ethical boundaries, and the risks and rewards of AI integration.

Speakers

**Beau Baker**, *Partner and Co-Chair, National Real Estate Financing Practice, Akerman LLP*

**Ella Grace Collard**, *Analyst, ACORE Capital*

**Josh Kaufman**, *Co-Founder, CarbonAI*

**Joe Lovell, CRI**, *Chief Administrative Officer, Colliers Mortgage*

**Dan Olsen, CCMS**, *Senior Vice President, KeyBank*

**Chris Shelton**, *Managing Director, Product & Engineering, RealINSIGHT*

9:30 AM - 9:45 AM

**Refreshment Break in the Exhibit Area**

*Location: Great Hall 4, 3rd Floor, Convention Center*

Sponsored by: Cotality

9:45 AM - 10:45 AM

**Special Servicing Focus Group Meeting (Open to MBA Members; Closed to Media)**

*Location: Great Hall 6, 3rd Floor, Convention Center*

Gain a deeper understanding of special servicing—its processes, challenges, and best practices. Ideal for special servicers and those eager to learn more about this critical function. Join us to explore real-world scenarios and enhance your expertise in navigating complex loan situations. Open to registered attendees with an active MBA membership.

9:45 AM - 10:45 AM

**BREAKOUT SESSION: Optimizing CMAs and DACAs - Strategies for Efficiency (CPE 1.2)**

*Location: Great Hall 1, 3rd Floor, Convention Center*

Effective management of Cash Management Accounts (CMAs) and Deposit Account Control Agreements (DACAs) is critical for timely processing and compliance. This session examines their structures, purposes, and documentation while highlighting best practices to overcome challenges and improve turnaround times. (Focus: Closing, Servicing/Operations, Technology)

Speakers

**Anthony Amo**, *Director, The Huntington National Bank*

**Marcy Burns**, *Director of Treasury Management Real Estate, PNC Real Estate*

**Keeley Fountain**, *Executive Director, Trimont*

**Dana Jo Martino, CCMS, Senior Vice President, Managing Director - Asset Management, Berkadia**

9:45 AM - 10:45 AM

**BREAKOUT SESSION: Innovative Insurance Strategies for High-Risk Properties (CPE 1.2)**

*Location: Great Hall 2, 3rd Floor, Convention Center*

With natural disasters driving up insurance challenges, servicers must find new ways to manage coverage and costs. A panel of experts explores innovative solutions to navigate rising premiums, mitigate risk, and ensure adequate protection for high-risk commercial properties. (Focus: Insurance)

Speakers

**Liz Friedman, Vice President, Insurance and Risk Management, The Community Preservation Corporation**

**Rick Luckett, Loan Servicing Manager, CBRE Loan Services, Inc.**

**Rachel A. Vaccaro, Colliers Mortgage**

**Christina Wagner, CCMS, Senior Vice President, Grandbridge Real Estate Capital LLC**

9:45 AM - 10:45 AM

**BREAKOUT SESSION: Strategic Approaches to Loan Assumptions, Extensions, and Modifications (CPE 1.2)**

*Location: Great Hall 5, 3rd Floor, Convention Center*

As loan assumptions, extensions, and modifications grow more complex, servicers must balance short-term relief with long-term stability. Industry experts will share best practices for managing these processes, addressing risks, and avoiding pitfalls like “extend-and-pretend” to ensure sustainable financial outcomes. (Focus: Asset Management)

Speakers

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

**Michael Heagerty, CCMS, Principal & Chief Financial Officer, Gantry**

**Sara Misbah, Senior Vice President, Director of Special Servicing, BWE**

**Steve Reynolds, SVP, PNC Real Estate**

9:45 AM - 11:45 AM

**MBA EDUCATION PRESENTS: Practical Application of Distressed Asset Valuation – Case Examples and Lender Perspectives**

*Location: Diplomat Ballroom 5, 2nd Floor, Convention Center*

As a follow up to the breakout session Valuations and Non-Recoverability – Assessing Distressed Assets (Monday, 3:30 PM), continue to expand your understanding of assessing the value of assets that are underperforming or in financial distress. This educational session, led by a panel of CCMS designees and default management experts, continues our exploration of this critical topic in commercial/multifamily lending. Through real-world case studies, you'll gain valuable insights into lender exit strategies, valuation methodologies, and the process of determining acceptable recovery in loss scenarios.

Speakers

**Julie Lange, CCMS, Sr. Mortgage Portfolio Advisor, Securian Financial**

**Kathleen Mylod, Partner, Dechert LLP**

**Jay Puckett, CCMS, Senior Managing Director, Trimont**

**Kevin Sullivan, CCMS, Senior Managing Director, JLL Capital Markets**

11:00 AM - 12:00 PM

**GENERAL SESSION: Unmasking Deception: Protecting CRE Servicing from Fraud (CPE 1.2)**

*Location: Great Hall 3, 3rd Floor, Convention Center*

From AI-driven scams to cash mismanagement, fraud presents a growing risk in commercial real estate servicing. Learn how to spot red flags, strengthen safeguards, and mitigate threats across key processes to protect assets and maintain integrity.

Speakers

**Sharon Briskman, Executive Vice President, Servicing & Asset Management, Greystone**

**Freddy Feliz, CIO & VP of Information Technology, Mortgage Bankers Association**

**Amy Frazey, CPA, Senior Vice President and Managing Director, StanCorp Mortgage Investors, LLC**

**Frankie T. Jones, Jr., CCMS, Vice President & Managing Director, Lincoln Financial Group**

**Howard Leiner, Chief Technology Officer, Arbor Realty Trust**

12:00 PM - 1:00 PM

**Networking Lunch in the Exhibit Area**

*Location: Great Hall 4, 3rd Floor, Convention Center*

Sponsored by: Alliant Insurance Services

12:30 PM - 2:00 PM

**DUS Operations Subcommittee (By Invitation Only)**

*Location: Diplomat Ballroom 1, 2nd Floor, Convention Center*

1:00 PM - 2:00 PM

**BREAKOUT SESSION: Optimizing Default Management and Servicing Transfers (CPE 1.2)**

*Location: Great Hall 2, 3rd Floor, Convention Center*

Rising problem loan volumes demand efficient servicing transfers. Through real-world case studies, industry experts reveal key distress indicators, best practices for seamless handoffs, and strategies to enhance communication and standardization—ensuring smoother default management and servicing transitions. (Focus: Asset Management, Servicing/Operations, Special Servicing, Technology)

Speakers

**David W. Haley**, *Senior Managing Director, CBRE Capital Markets*

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

**Leslie Hayton**, *CCMS, Senior Managing Director, CPI, Trimont*

**Dan O'Shaughnessy**, *CCMS, BWE*

1:00 PM - 2:00 PM

**Small Servicers Committee Meeting (Open to MBA Members; Closed to Media)**

*Location: Great Hall 6, 3rd Floor, Convention Center*

1:00 PM - 2:00 PM

**BREAKOUT SESSION: Mastering Loan Document Review for Risk and Compliance (CPE 1.2)**

*Location: Great Hall 1, 3rd Floor, Convention Center*

Thorough loan document review is essential for compliance and risk mitigation. This session covers key focus areas, escalation protocols, and cross-department collaboration to ensure seamless loan servicing and operational integrity. (Focus: Asset Management, Closing, Compliance, Legal, Servicing/Operations, Technology)

Speakers

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

**Tiffany Moneta**, *Portfolio Manager, Wells Fargo Bank, N.A.*

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

**Katie Schwarting, Esq.**, *Partner, Seyfarth Shaw LLP*

1:00 PM - 2:00 PM

**BREAKOUT SESSION: Proactive Watchlist Management in a High-Rate Environment (CPE 1.2)**

*Location: Great Hall 5, 3rd Floor, Convention Center*

Rising interest rates heighten loan risks, making early detection of default indicators essential. Learn key factors to monitor, strategies for proactive watchlist management, and best practices for mitigating potential defaults before they escalate. (Focus: Asset Management, Legal, Servicing/Operations)

Speakers

**Ryan L. Barlow**, *Portfolio Manager, CBRE Capital Markets*

**Gina DiRuggeris**, *Assistant Vice President, Asset Management, Newmark*

**Lisa Fields**, *Assistant Vice President, Pacific Life Insurance Company*

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

2:15 PM - 3:15 PM

**GENERAL SESSION: Master the Art of Being You to Cultivate Wellness in a Stressful World (CPE 1.2)**

*Location: Great Hall 3, 3rd Floor, Convention Center*

Merrick Rosenberg is an internationally acclaimed speaker, author, thought leader and entrepreneur known for his groundbreaking insights into the different personality styles. In this highly engaging presentation, you'll learn how to tap into your innate strengths and rise to a higher level of performance and satisfaction. Learn resiliency, how to achieve greater balance, and minimize stress and drama in your life.

Speaker

**Merrick Rosenberg**, *Author, Keynote Speaker, and Entrepreneur, Take Flight Learning*



3:15 PM - 3:30 PM

**Refreshment Break in the Exhibit Area**

*Location: Great Hall 4, 3rd Floor, Convention Center*

Sponsored by: Cotality

3:30 PM - 5:00 PM

**Servicing Senior Executives Roundtable (Open to MBA Members; Closed to Media)**

*Location: Great Hall 6, 3rd Floor, Convention Center*

3:30 PM - 4:30 PM

**BREAKOUT SESSION: Enhancing Loan Servicing Efficiency with AI and Self-Service (CPE 1.2)**

*Location: Great Hall 1, 3rd Floor, Convention Center*

AI and self-service technologies are transforming commercial real estate loan servicing, streamlining operations, and boosting competitiveness. Industry experts, including asset managers and loan servicers, share insights on practical applications that drive efficiency and improve workflow management. (Focus: Servicing/Operations, Technology)

Speakers

**Stephanie Canzani**, *Chief Operating Officer, The Community Preservation Corporation*

**Sachin Kapoor**, *Managing Director, CBRE Capital Markets*

**Jason Keith**, *Assistant Vice President, RealINSIGHT*

**Jeff Saul**, *Co-Founder, CEO, CarbonAI*

3:30 PM - 4:30 PM

**BREAKOUT SESSION: Mastering Lease Reviews Across Markets and Property Types (CPE 1.2)**

*Location: Great Hall 2, 3rd Floor, Convention Center*

Lease reviews in commercial real estate vary by market dynamics, property types, and regional regulations. This deep dive will explore the complexities to help professionals understand risk mitigants, ensure compliance, and secure favorable terms. (Focus: Asset Management)

Speakers

**Shannon M. Carmack, CCMS**, *Director - Commercial Mortgage Analytics and Administration, Ameritas Investment Partners*

**Jennifer Poulson**, *Senior Closer, BWE*

**Russell Richardson, Esq., CMB, CCMS, *Director, PGIM***

**Travis Shafer, *Principal, Miles & Stockbridge***

3:30 PM - 4:30 PM

**BREAKOUT SESSION: Beyond the Checklist - Building a Proactive Risk Culture (CPE 1.2)**

*Location: Great Hall 5, 3rd Floor, Convention Center*

Effective loan servicing and risk controls go beyond checking the boxes—it requires servicing shops to transcend traditional task-oriented approaches and embrace a strategic risk mitigation mindset. Discover how to identify, assess, and address risks collaboratively, ensuring smarter decision-making and stronger portfolio protection. (Focus: All Areas)

Speakers

**Jason Berry, *Chief Operating Officer, Slatt Capital***

**Grace Bodemuller-Holst, *Director of Operations, Argentic***

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

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

Wednesday, May 21, 2025

8:00 AM - 10:30 AM

**Registration**

*Location: Great Hall Foyer, 3rd Floor, Convention Center*

8:30 AM - 9:00 AM

**Continental Breakfast**

*Location: Great Hall Foyer, 3rd Floor, Convention Center*

Sponsored by: HUB Financial Services

9:00 AM - 10:30 AM

**Closing Super Session (Closed to Media) (CPE 1.8)**

*Location: Great Hall 1, 3rd Floor, Convention Center*

Wrap up the conference with a dynamic discussion on the latest trends and challenges in commercial/multifamily finance servicing. Engage with peers, share insights, and ask questions in this interactive and informal forum. Come as you are and join the conversation before heading home. (Focus: All Areas)

#### Speakers

**Michael Bruggman**, *Executive Director, Head of FHA Asset Management, Wells Fargo Multifamily Capital*

**Grisela Crespo**, *Director of Commercial Real Estate Practice, Fortress Risk Consultants, LLC*

**Kelley Griner, CCMS**, *Assistant Director - Senior Loan Servicing Manager, Symetra Life Insurance Company*

**David A. Harrison**, *Chief Operating Officer, Midland Loan Services*

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

**Katie Schwarting, Esq.**, *Partner, Seyfarth Shaw LLP*

**Jamie Woodwell**, *Senior Vice President of Commercial/Multifamily Policy and Strategic Industry Engagement, Mortgage Bankers Association*