

Summit on Diversity and Inclusion 2018

November 27 to 28, 2018

Tuesday, November 27, 2018

3:00 PM - 5:00 PM

Diversity and Inclusion Advisory Committee Meeting (Committee Members Only)

Location: Senate Room, Second Floor

3:00 PM - 6:30 PM

Registration

Location: Capital Terrace, Second Floor

5:00 PM - 6:30 PM

Opening Reception

Location: Congressional Room, Second Floor

6:00 PM - 7:30 PM

mPact Event: Everyone Can Lead: Advocating for Inclusion from Every Level

Location: Senate Room, Second Floor

Join us for an engaging event, that will highlight how to be a leader of inclusion regardless of your position or title. Trina Scott, Vice President of Diversity and Inclusion of Quicken Loans, Inc., and Stefen Welch, Director of Diversity and Inclusion at Quicken Loans, Inc., will lead an in-depth and interactive discussion on how you can be a leader of diversity and inclusion within the real estate finance industry.

Speaker

Trina Govan Scott, *Vice President, Diversity and Inclusion, Quicken Loans, Inc.*

Wednesday, November 28, 2018

7:30 AM - 5:00 PM

Registration

Location: Capital Terrace, Second Floor

8:00 AM - 8:30 AM

Continental Breakfast

Location: Capital Terrace, Second Floor

8:30 AM - 9:30 AM

Opening General Session: Leading the Charge - Real Estate Finance Executives Making A Difference

Location: Presidential Ballroom, Second Floor

Leading executives from a range of business models in both residential and commercial/multifamily real estate share their success stories and reflect on their strategies to address their biggest challenges in moving D&I initiatives forward. Corporate culture, staffing, market outreach and more are all topics of discussion.

Speakers

Robert D. Broeksmit, CMB, *President and Chief Executive Officer, Mortgage Bankers Association*

Karen Buck, *Head of Commercial, Retail and Payment Operations, TD Bank*

Kristy Fercho, *President, Mortgage, Flagstar Bank, FSB*

David Hrobon, *President and Chief Executive Officer, Wintrust Mortgage, a Division of Barrington Bank & Trust Company, N.A.*

Jeffrey T. Majewski, *Executive Managing Director, CBRE Capital Markets*

Eddy Perez, CMB, *President, Equity Prime Mortgage LLC*

Susan Stewart, *2019 MBA Vice Chairman, Chief Executive Officer, SWBC Mortgage*

9:30 AM - 10:30 AM

General Session: Lessons from Beyond Real Estate Finance

Location: Presidential Ballroom, Second Floor

Although the mission, history, market forces and regulatory environment surrounding the mortgage industry make it unique, diversity and inclusion are universal. Learn from the vast experience of Deborah Rosado Shaw, a trusted advisor, strategist and coach to some of the world's best companies and organizations seeking to win against the ever-growing complexity of culture, talent engagement, diversity and leadership. Deborah's transformational approach to building high performance teams and powering critical business objectives has consistently produced game changing outcomes across her career, which has spanned successful entrepreneur, corporate leader, sales executive, civic activist and author, including her most recent role as PepsiCo's SVP, Chief Global Diversity & Engagement.

Speaker

Deborah Rosado Shaw, *Global Expert in Leadership, Diversity and Performance*, *Entrepreneur*, *Corporate Leader*, *Civic Activist*

10:30 AM - 10:45 AM

Refreshment Break

Location: Capital Terrace, Second Floor

10:45 AM - 11:15 AM

General Session: Market Snapshot

Location: Presidential Ballroom, Second Floor

Learn what key economic indicators are suggesting about the real estate finance market, including homeownership and housing affordability data by various segments.

Speakers

Joel Kan, *Associate Vice President, Economic and Industry Forecasting, Mortgage Bankers Association*

Tian Liu, *Chief Economist, Genworth Mortgage Insurance*

11:15 AM - 11:45 AM

General Session: Success Stories: Two Young Professionals on the Rise

Location: Presidential Ballroom, Second Floor

Hear from two young professionals who've recently gained exposure to real estate finance, and have found success.

Speakers

Tamara King, *Vice President, Residential Policy and Member Engagement, Mortgage Bankers Association*

Kyle Knight, *Talent Acquisition Specialist, Walker & Dunlop, LLC*

Nicholas Whiteside, *Student Government Association, Business Manager, Fisk University*

11:45 AM - 1:00 PM

mPower Lunch - Keeping Up with D&I in a Down Market

Location: Presidential Ballroom, Second Floor

A panel of industry leaders offer solutions to keep D&I objectives top of mind when other business pressures are mounting. Through their personal stories, they share strategies to help you keep your focus in the face of competing priorities. They also explore the unique leadership role women have traditionally played in this space.

Speakers

Dominica Groom, *Vice President, Diversity and Inclusion, Freddie Mac*

Lisa J. Haynes, CPA, *Chief Financial Officer and Chief Diversity and Inclusion Officer, Mortgage Bankers Association*

Miguel Narvaez, *Chief Production Officer and Partner, Alterra Home Loans*

Desirée Patno, *Chief Executive Officer and President, Women in the Housing and Real Estate Ecosystem (NAWRB) and Desirée Patno Enterprises, Inc. (DPE)*

J. Tony Thompson, III, CMB, *Vice President, Growth & Strategy, Silverton Mortgage Specialists*

1:15 PM - 2:00 PM

BUSINES STRATEGIES TRACK: Strategies to Reach the Underserved

Location: Presidential Ballroom, Second Floor

Learn ways to reach and meet the demands of various untapped or underserved markets. Hear from experts on how they successfully serve multigenerational borrowers, customers with Limited English Proficiency (LEP), those with nontraditional employment and others with complex underwriting needs.

Speakers

Hope R. Atuel, *Executive Director, Asian Real Estate Association of America (AREAA)*

Phil Bracken, *Managing Director, Government & Mortgage Industry Relations, VantageScore Solutions, LLC*

Marcia J. Griffin, *Founder & President, HomeFree-USA*

Noerena Limon, *Senior Vice President, Public Policy and Industry Relations, The National Association of Hispanic Real Estate Professionals (NAHREP)*

Donald Maxwell, *Managing Partner, M.A.T. Consultant Group LLC*

Cindy Waldron, *Director, Research Analytics and Modeling, Single-Family Division, Freddie Mac*

1:15 PM - 2:00 PM

ROUNDTABLE: Beyond Race and Gender: Invisible Diversity in the Workplace (Closed to Media)

Location: Congressional Room, Second Floor

It can be especially challenging to be inclusive of diversity that is not obvious. Explore successful ways companies can develop and maintain a culture that acknowledges and embraces differences that are often unseen, including age, sexual orientation and physical or developmental differences.

Speakers

Alicia S. Boykins, PHR & SHRM-CP, *Director, Human Resources and Administration, National LGBTQ Task Force*

Erik Richard, *Founder and Chief Executive Officer, Landmark Network, Inc.*

Darlene Slaughter, *Chief Diversity Officer, United Way*

Lori Trawinski, Ph.D., CFP®, *Age Diversity & Inclusion Thought Leader, AARP Public Policy Institute*

2:15 PM - 3:00 PM

BUSINESS STRATEGIES TRACK: In Their Own Words: Millennial Leaders in the Mortgage Industry

Location: Presidential Ballroom, Second Floor

A panel of successful Millennials tell us “in their own words” why they entered the industry and what has kept them engaged. Insightful for anyone running or recruiting a team, learn what companies can do to create a culture that attracts, retains, and maximizes the potential of employees like them.

Speakers

Yannick Diouf, *Relationship Manager, Single Family Northeast Customer Delivery Team (CDT), Fannie Mae*

Saurabh Mahajan, *Assistant Vice President, MidCap Financial, Inc.*

Alex McGillis, *Product Manager and Team Leader, Quicken Loans, Inc.*

Kristin Messerli, *CEO/Multicultural Consultant, Cultural Outreach Solutions*

Jesus Neri, *Branch Manager, Alterra Home Loans*

2:15 PM - 3:00 PM

ROUNDTABLE: Cultivating a Culture of Inclusion in Divisive Times (Closed to Media)

Location: Congressional Room, Second Floor

Divisive rhetoric has spread beyond private conversations and into public discourse, putting companies in the cross-hairs of politics. Discuss how company leaders walk the line of political neutrality while cultivating a culture of workplace inclusion.

Speakers

Christopher D. Bell, *Partner, Ballard Spahr LLP*

Bill Fahey, *Vice President, Office of Minority and Women Inclusion (OMWI), Fannie Mae*

Tujuanna B. Williams, *Principal, Tujuanna Williams Consulting*

Loreli Wilson, *Director, Diversity & Inclusion Programs, Veterans United Home Loans*

3:00 PM - 3:15 PM

Refreshment Break

Location: Capital Terrace, Second Floor

3:15 PM - 4:00 PM

BUSINESS STRATEGIES TRACK: Winning Ideas and Inspiration from D&I Award Recipients

Location: Presidential Ballroom, Second Floor

Learn the secrets to their success. Representatives from the companies who won MBA's 2018 Residential and 2018 Commercial/ Multifamily Diversity Awards give an overview of programs and strategies they've implemented to excel in diversity and inclusion in their organizations.

Speakers

James McDuffie, *Senior Vice President, Manager Diverse Lending, First Citizens Bank*

Miguel Narvaez, *Chief Production Officer and Partner, Alterra Home Loans*

Joe Palank, *Assistant Director, Member Engagement, Mortgage Bankers Association*

Susan Sullivan, *Senior Vice President, Human Resources, Genworth Mortgage Insurance*

Loreli Wilson, *Director, Diversity & Inclusion Programs, Veterans United Home Loans*

3:15 PM - 4:00 PM

ROUNDTABLE: Developments in Fair Lending Issues (Closed to Media)

Location: Congressional Room, Second Floor

Get an overview of key developments in fair lending, including recent court decisions and compliance. Learn

about the key areas of concern and how to monitor your business operations to best comply with Fair Lending requirements.

Speakers

Maurice Jourdain-Earl, *Managing Director and Co-Founder, ComplianceTech*

Andrea Mitchell, *Partner, Buckley Sandler LLP*

Lisa Rice, *President and Chief Executive Officer, National Fair Housing Alliance (NFHA)*

Antoine M. Thompson, *Executive Director, National Association of Real Estate Brokers (NAREB)*

Frank Vespa-Papaleo, *Principal Deputy Director, Office of Fair Lending & Equal Opportunity, Bureau of Consumer Financial Protection*

4:15 PM - 5:00 PM

BUSINESS STRATEGIES TRACK: Using Technology and Data Analytics to Impact D&I

Location: Presidential Ballroom, Second Floor

Learn from experts how data and technology can help your company be strategic, effective, and cost-conscious in advancing diversity and inclusion efforts.

Speakers

Dr. Chitra Dorai, *Data Science & AI Expert, Entrepreneur, Member, NAWRB's Diversity and Inclusion Leadership Council*

Marie Gayo, *President, Trident Mortgage Company*

Robert H. Johnson, Jr., *Founder, RHJ Consulting Group, LLC*

4:15 PM - 5:00 PM

ROUNDTABLE: Maximizing CRA Opportunities (Closed to Media)

Location: Congressional Room, Second Floor

Obtain quick tips on how to improve or expand your CRA residential mortgage lending program, whether through growing in-house volume or generating volume through third-party partnerships.

Speakers

Richard T. Bechtel, *Executive Vice President and Head of U.S. Residential Lending, TD Bank*

West Beibers, CMB, AMP, *President, The Commonwealth Group*

Sandra Braswell, *Senior Vice President, Mortgage CRA and Fair Lending Manager, BB&T*

Robert Chrane, *Chief Executive Officer, Down Payment Resource*