

# CREF Servicing & Technology Conference 2019

May 14 to 17, 2019

Tuesday, May 14, 2019

8:00 AM - 5:00 PM

**Member Engagement Suite**

*Location: Platinum Ballroom I, Second Floor*

12:00 PM - 3:30 PM

**CCMS Exams**

*Location: Olympic I, Third Floor*

12:00 PM - 4:00 PM

**COMBOG Advisory Committee Meeting (By Invitation Only)**

*Location: Platinum Ballroom H, Second Floor*

2:00 PM - 4:00 PM

**Life Company Servicer Executives Roundtable (Committee Members Only; Closed to Media)**

*Location: Platinum Ballroom B, Second Floor*

2:00 PM - 4:00 PM

**Life Company Servicer Managers Roundtable (Committee Members Only; Closed to Media)**

*Location: Platinum Ballroom A, Second Floor*

3:00 PM - 6:00 PM

**Registration**

*Location: Platinum Ballroom Foyer, Second Floor*

3:30 PM - 5:00 PM

**FHA Servicers Subcommittee Meeting (Committee Members Only; Closed to Media)**

*Location: Platinum Ballroom C, Second Floor*

4:00 PM - 6:00 PM

**CCMS Committee Meeting (Committee Members Only ; Closed to Media)**

*Location: Diamond Ballroom 9, Third Floor*

5:00 PM - 6:00 PM

**mPact Networking Reception (MBA's Young Professional Network; Open to attendees 35 years and younger.)**

*Location: Platinum Ballroom Foyer, Second Floor*

Join your peers and industry leaders at this exciting event designed to provide young professionals with the chance to deepen industry connections and understanding. This is a unique opportunity to expand professional relationships, exchange ideas and discuss industry engagement with your associates, industry experts and MBA senior-level staff.

Wednesday, May 15, 2019

7:30 AM - 5:00 PM

**Exhibit Area Open**

*Location: Platinum Ballroom E, Second Floor*

7:30 AM - 5:00 PM

**Registration**

*Location: Platinum Ballroom Foyer, Second Floor*

8:00 AM - 8:30 AM

**Continental Breakfast in the Exhibit Area**

*Location: Platinum Ballroom E, Second Floor*

8:00 AM - 5:00 PM

**Member Engagement Suite**

*Location: Platinum Ballroom I, Second Floor*

8:30 AM - 9:50 AM

**Opening General Session with CCMS Designations: The Developmental History of L.A. LIVE**

*Location: Diamond Ballroom 4, Third Floor*

CMST19 kicks-off with a history of the development of L.A. LIVE and the Staples Center, famous for revitalizing downtown Los Angeles. Learn how the revitalization got started, what it took to make it happen, and the vision for the future from the chief revenue officer of AEG, the management company responsible for operating the JW Marriott, Ritz-Carlton, and premium seating activities at L.A. LIVE.

Speakers

**Clare C. Dooley, CCMS, 2019 CCMS Committee Chair, and Senior Vice President, Berkadia Commercial Mortgage**

**Todd Goldstein, Chief Revenue Officer, AEG**

**C. Kent Jurgensen, CCMS, 2019 CCMS Education Committee Chair, Director - CMS Asset Management, Principal Real Estate Investors**

**Joe Lovell, Senior Vice President and Chief Operating Officer, Grandbridge Real Estate Capital**

**Brian F. Stoffers, CMB, 2019 MBA Chairman-Elect, Global President, Debt & Structured Finance, CBRE**

10:00 AM - 10:50 AM

**General Session: Cyber Security: From the Inside Looking Out**

*Location: Diamond Ballroom 4, Third Floor*

In a world where cyber threats are both present and evolving, industry experts share their thoughts on how your organization can provide the best internal defense against cyber intrusions with the potential to have catastrophic consequences. Experts focus on real life intrusion experiences, mitigation techniques, as well as employee training directed at threat identification. Proactive prevention is key when it comes to hedging against security breaches, and this panel provides tools for predicting the most common types of threats and managing your cyber security environment via internal processes and procedures.

Speakers

**Joni Brown-Haas**, *President, PGIM Real Estate Finance*

**Thomas A. Dryden**, *Chief Information Security Officer, Berkadia*

**Christopher P. Fielder**, *Director, Digital & Technology, CBRE Loan Services, Inc.*

**Amy Frazey, CPA**, *Assistant Vice President, Investment Administration, StanCorp Mortgage Investors, LLC*

**Troy Smekens**, *IT Developer, Bellwether Enterprise Real Estate Capital, LLC*

10:50 AM - 11:00 AM

**Refreshment Break in the Exhibit Area**

*Location: Platinum Ballroom E, Second Floor*

11:00 AM - 12:00 PM

**Enhancing Culture and Productivity: Interpersonal Styles**

*Location: Diamond Ballroom 6, Third Floor*

Awareness of your personal style and those of your colleagues can aid or hinder an organization's productivity and inclusion. In this session learn to identify your personal style and learn how knowledge of alternate styles can be used to augment department performance and minimize conflicts.

Speakers

**Shelley Hasskamp, CCMS**, *Senior Vice President, Bellwether Enterprise Real Estate Capital, LLC*

**DeAnne Reed, AVP**, *Servicing Operations, Pacific Life Insurance Company*

11:00 AM - 12:00 PM

**Loan Management and Surveillance**

*Location: Diamond Ballroom 5, Third Floor*

Asset managers receive an abundance of data and information regarding the loans serviced, and need to execute a variety of tasks - from compiling and coordinating the data to form a full picture of the asset and its performance, to evaluating the data from various sources, to providing a feedback loop when provisions

seem to punish the performing borrower. Hear from asset managers as they discuss practices that allow them to maintain flexibility while ensuring that pertinent information doesn't fall through the cracks.

Speakers

**Amr Fawzi**, *Director, Credit Risk Management, Fannie Mae*

**Adam Fox**, *Senior Director, Fitch Ratings*

**Glenn Gilbert**, *Director, Wells Fargo Bank, N.A.*

**Charles Scott**, *Director, Surveillance, PGIM Real Estate Finance*

**Brian J. Shoch**, *CCMS, Senior Vice President, Berkadia*

11:00 AM - 12:00 PM

**Servicing Technology: Today & Tomorrow**

*Location: Diamond Ballroom 4, Third Floor*

This session is dedicated to sharing the grand and mundane of the technologies that servicing companies are utilizing and deploying to continue moving forward into the 21st century. Learn the current tech trends for efficiency, accuracy and cost savings, and hear the impetus behind the trends.

Speakers

**Brian Hanson**, *2019 Vice Chair, MBA Servicer Council and Managing Director, CW Capital Asset Management LLC*

**Alan Kronovet**, *CCMS, Head of Commercial Mortgage Servicing, Wells Fargo Bank, N.A.*

**Ted Merkle**, *Senior Director of Strategic Transformation, Freddie Mac Multifamily*

**Chris Shamaly**, *Senior Managing Director, CBRE Loan Services, Inc.*

12:00 PM - 1:15 PM

**Asset Managers Roundtable Meeting (Open to Members; Closed to Media)**

*Location: Platinum Ballroom B, Second Floor*

12:00 PM - 1:00 PM

**Lunch in the Exhibit Area**

*Location: Platinum Ballroom E, Second Floor*

12:00 PM - 1:30 PM

**StanCorp Mortgage Investors, LLC Correspondent Meeting (Closed)**

*Location: Gold Ballroom 4, First Floor*

1:00 PM - 1:50 PM

**Learning Lab: Bridging the Gap - Servicing and Banking**

*Location: Diamond Ballroom 5, Third Floor*

This panel helps break down the legal and regulatory background behind a bank's need for information. Discussion centers around bank requirements and potential practices to streamline the banking relationship.

Speakers

**Michael Kenney**, *Vice President, Operational Risk, Freddie Mac*

**Beth Moskow-Schnoll**, *Managing Partner, Ballard Spahr, LLP*

1:00 PM - 1:50 PM

**Learning Lab: Construction Servicing - From Ground-up to Rehab**

*Location: Diamond Ballroom 4, Third Floor*

As lenders look to compete in the construction loan and value add space and as catastrophes cause servicers and asset managers to manage rehab, it is prudent to understand the risks involved with seeing a construction project through. This learning lab covers the risks involved in construction servicing and the surveillance that will assist you in managing loans and properties with a construction element.

Speakers

**Patrick Dahnert**, *Director & Partner, Essex Financial Services LLC*

**Bonnie Hochman Rothell**, *Partner, Morris, Manning & Martin, LLP*

1:00 PM - 1:50 PM

**Learning Lab: Keeping Tabs On Underlying Risks**

*Location: Diamond Ballroom 6, Third Floor*

Analyzing operating statements and rent rolls is at the heart of reporting property performance. But in addition to expense and occupancy trends and coverage ratios, what can we learn from these reports? Join this group of asset managers and rating agency analysts as they look at borrower and property reports to evaluate risks by property type.

Speakers

**Roy Chun**, *Managing Director, Kroll Bond Rating Agency*

**Gwen Roush**, *Vice President, CMBS Surveillance, DBRS, Inc.*

**Dugger Schwartz**, *Senior Vice President - Real Estate Solutions, PNC Real Estate*

1:00 PM - 1:30 PM

**Nuveen Real Estate Correspondent Meeting (Closed)**

*Location: Diamond Ballroom 9, Third Floor*

2:00 PM - 2:50 PM

**General Session: The Economic and Commercial Real Estate Market Outlook**

*Location: Diamond Ballroom 4, Third Floor*

E-commerce, last-mile industrial, apartment construction, flexible workspace, the Federal Reserve, property valuations, new capital sources, loan performance. There is \$3.3 trillion of commercial mortgage debt outstanding in the United States, and as that figure continues to grow, so do the topics driving changes to commercial real estate. MBA's Vice President of Research & Economics, Jamie Woodwell, discusses the latest on the economy and the CRE marketplace, with a special focus on issues of importance to commercial and multifamily 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.

Speakers

**Steven R. Johnson**, *Managing Director of Commercial Mortgage Servicing, Principal Real Estate Investors*

**Jamie Woodwell**, *Vice President, CRE Research & Economics, Mortgage Bankers Association*

2:50 PM - 3:00 PM

**Refreshment Break in the Exhibit Area**

*Location: Platinum Ballroom E, Second Floor*

2:50 PM - 3:50 PM

**Servicer Council Advisory Committee Meeting (By Invitation Only)**

*Location: Platinum Ballroom H, Second Floor*

3:00 PM - 4:00 PM

**Everyday Software: Leveraging the Basics**

*Location: Diamond Ballroom 5, Third Floor*

Companies are developing applications or utilizing existing websites, third party applications and licensing third party software to manage the servicing responsibilities and provide information. Expert panelists from the entire servicing spectrum discuss the sourcing, storage and safety of data and information that enhances investor understanding of the loans and how you may be able to leverage systems that you currently have in place.

Speakers

**Jason Berry**, *Chief Operating Officer, Barry Slatt Mortgage Company*

**Bryan Doyle**, *Director, Operations & Technology, CBRE Capital Markets*

**Colleen Larkin**, *CRI, Managing Director, NYL Real Estate Investors*

**Bob Wright**, *CMB, CCMS, Director, Business Development, SS&C*

3:00 PM - 4:00 PM

**Freddie Mac Correspondent Meeting (Closed)**

*Location: Gold Ballroom 3, First Floor*



3:00 PM - 4:00 PM

**Insurance: Safeguarding Your Closing Timeline**

*Location: Diamond Ballroom 4, Third Floor*

If not managed correctly, insurance requirements can delay closing. Experts discuss the risks the insurance is intended to mitigate, how the insurance request may be interpreted by the agent, how last minute requests or delivery can negatively impact the transaction and information that should be required of the borrower to ensure compliance during the term of the loan.

Speakers

**Becky Browning**, *SVP-Closing & Insurance, Armada Analytics, Inc.*

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

**Misty Leeth**, *Managing Director, Red Mortgage Capital*

**Emily Rasmussen**, *Managing Director, Operations & GSE Review, Harbor Group Consulting, LLC*

3:00 PM - 4:00 PM

**There is no “I” in Talent Management**

*Location: Diamond Ballroom 6, Third Floor*

Managers, supervisors and team leads, join this interactive session for practical recommendations across the spectrum of talent development - from identification of potential stars to retention, support and promotion. Facilitators will provide you with ideas and action items to better know your staff, develop a talent pipeline, enhance leadership skills and create a culture of ownership among all employees. Come prepared to share your own experiences and best practices. There is no “I” in talent management so join this group and get the absolute best from your team.

Speakers

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

**C. Kent Jurgensen**, *CCMS, 2019 CCMS Education Committee Chair, Director - CMS Asset Management, Principal Real Estate Investors*

**Katie Schwarting**, *Partner, Bryan Cave Leighton Paisner, LLP*

**Richard Tsui, Senior Director, Nuveen Real Estate**

4:00 PM - 5:30 PM

**HMDA Reporting Debrief (HMDA Reporting Representatives)**

*Location: Platinum Ballroom B, Second Floor*

4:00 PM - 5:00 PM

**Opening Reception in the Exhibit Area: Hooray for Hollywood**

*Location: Platinum Ballroom E, Second Floor*

5:00 PM - 6:00 PM

**MBA Advocacy Reception (Current “active” MAA Members only, Sign-Up at the Door) (Closed to Media)**

*Location: Platinum Ballroom Foyer, Second Floor*

Thursday, May 16, 2019

7:30 AM - 5:30 PM

**Registration**

*Location: Platinum Ballroom Foyer, Second Floor*

7:30 AM - 8:30 AM

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

*Location: Platinum Ballroom A, Second Floor*

8:00 AM - 8:30 AM

**Continental Breakfast in the Exhibit Area**

*Location: Platinum Ballroom E, Second Floor*

8:00 AM - 3:00 PM

**Exhibit Area Open**

*Location: Platinum Ballroom E, Second Floor*

8:00 AM - 5:00 PM

**Member Engagement Suite**

*Location: Platinum Ballroom I, Second Floor*

8:30 AM - 9:50 AM

**General Session: The True Competitive Advantage**

*Location: Diamond Ballroom 4, Third Floor*

What if you had an intelligent frameworks for working with your colleagues? What if this understanding not only demystified why people say and do the things they do, but also revealed how your team can maximize its potential? Such a framework exists through a simple four-style model of behavior associated with bird personality types: Eagles, Parrots, Doves and Owls. This fun and inspirational presentation helps you to identify your own personality style, as well as those of your co-workers and clients, to improve communication in the workplace.

Speakers

**Brian Hanson**, *2019 Vice Chair, MBA Servicer Council and Managing Director, CW Capital Asset Management LLC*

**Michael Heagerty**, *CCMS, Principal, Newmark Realty Capital, Inc*

**Dan Silvert**, *President, Velocity Advisory Group*

10:00 AM - 10:50 AM

**Capitalizing on Agile**

*Location: Diamond Ballroom 5, Third Floor*

One of the strengths of a robust system and the framework on which agile development works is the ability to create applications that can attach and feed from existing technologies. This discussion will cover a range of topics from rethinking the ways that we develop systems to the key factors in differentiating our operations. Experts address the needs and practicalities of managing development within a smaller servicing operation.

Speakers

**Bryan Burton**, *Domain Manager, KeyBank Real Estate Capital*

**Rob Lowther**, *Managing Director, Hunt Real Estate Capital*

**Melinda Nolden**, *CISA, Head of Product - Viewpoint, DBRS, Inc.*

**Lyle Shapland**, *Senior Vice President, Director of Enterprise! Client Services, PNC Real Estate*

10:00 AM - 11:00 AM

**Fannie Mae Correspondent Meeting (Closed)**

*Location: Gold Ballroom 3, First Floor*

10:00 AM - 10:50 AM

**Let's Talk Insurance**

*Location: Diamond Ballroom 6, Third Floor*

Insurance professionals share insights into some of the everyday decisions about property and liability insurance coverage affecting servicing, such as: Why are financed premiums frowned on? Why is terrorism insurance required for all properties? What is TIV and why should I care? Audience polling will help to focus the discussion, so bring your questions!

Speakers

**Robert DeRosa**, *First Vice President, Alliant Insurance Services*

**Danielle Lombardo**, *SVP, Lockton*

**Mike Nardiello**, *SVP Property Products Leaders, CNA*

**George O'Neill III**, *CPCU, ARM, CRM, ChFC, Managing Director, CW Capital Asset Management LLC*

10:00 AM - 10:50 AM

**The Evolution of Borrower Requests**

*Location: Diamond Ballroom 4, Third Floor*

What does a Borrower request look like in 2019? Have the duties of the servicer increased or decreased as

loan and pool documents have evolved? Panelists review how a servicer can manage costs of new and/or expanded services, partner expectations, changes in the consent model and more, and provide examples of changes which have occurred over the past years

Speakers

**Richard Marion, CCMS, Senior Vice President, Capital One Commercial Real Estate**

**Typhani Phillips, Director, Situs**

**Anne Seehusen, Loan Portfolio Manager, NorthMarq**

**Niral Shah, Managing Director, Rialto Capital Advisors**

10:50 AM - 11:00 AM

**Refreshment Break in the Exhibit Area**

*Location: Platinum Ballroom E, Second Floor*

11:00 AM - 12:00 PM

**Difficult Conversations**

*Location: Diamond Ballroom 6, Third Floor*

Whether attempting to eliminate destructive behavior, maximize creative behavior or preparing to deliver unwelcome news, this session will offer practical advice. Speakers will address preparation for the conversation, managing the communication, objectively describing the issue and potential solutions, as well as methods to confirm that the conversation is understood.

Speakers

**Leslie Hayton, CCMS, Managing Director, Wells Fargo Bank, N.A.**

**Dan Olsen, CCMS, Senior Vice President, KeyBank Real Estate Capital**

**Ronald Steffenino, Senior Managing Director, Newmark Knight Frank**

**Jan Sternin, CMB, Senior Vice President, Managing Director, Berkadia**

11:00 AM - 12:00 PM

**HUD Multifamily and Healthcare: Partnering to Advance**

*Location: Diamond Ballroom 4, Third Floor*

This session provides an open dialogue between FHA asset managers and HUD senior leadership. Experts address challenges involved in the navigation of HUD multifamily and healthcare loan servicing as HUD modernizes some regulatory guidance and reviews other long-standing protocols. Panelists discuss ways in which HUD and FHA lenders can collaborate to find a path to the shared goals of optimizing the borrower experience while implementing HUD's enhanced portfolio oversight and surveillance.

Speakers

**Samantha Brooks**, *Vice President FHA, USDA & Non-Agency Asset Management, Greystone*

**Philip Head**, *Acting Director, Office of Residential Care Facilities, Asset Management Division, U.S. Department of Housing and Urban Development*

**Roger Lukoff, MA, FACHE**, *Deputy Assistant Secretary, FHA Office of Healthcare Programs, U.S. Department of Housing and Urban Development*

**Brian Murray**, *Deputy Director, Office of Asset Management and Portfolio Oversight, Office of Multifamily Housing Programs, U.S. Department of Housing and Urban Development*

**Tommy Nance**, *Director, PGIM Real Estate Finance*

11:00 AM - 12:00 PM

**Let's Talk Closing**

*Location: Diamond Ballroom 5, Third Floor*

Closing professionals share insights into everyday topics such as 3rd party reports, insurance coverage and evidence; estoppels and SNDAs, ALTA Land Surveys, title issues, tax and insurance analysis, due diligence to external parties and more. Learn to develop a standard checklist for closing and learn about the hand off procedure - to servicers, investment committees and others.

Speakers

**Sharon Briskman**, *Chief Financial Officer, Greystone*

**Caleb Coffman**, *Director, Loan Operations, StanCorp Mortgage Investors, LLC*

**David Croskery**, *Senior Managing Director, Loan Servicing Group, HFF*

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

12:00 PM - 1:00 PM

**Attorney Roundtable (Open to Members; Closed to Media)**

*Location: Platinum Ballroom H, Second Floor*

12:00 PM - 1:15 PM

**Insurance Stakeholders Meeting (Open to Roundtable Members; Closed to Media)**

*Location: Platinum Ballroom A, Second Floor*

12:00 PM - 1:00 PM

**Lunch in the Exhibit Area**

*Location: Platinum Ballroom E, Second Floor*

1:00 PM - 1:50 PM

**Learning Lab: Loan Documents: Key Terms and Negotiation Points**

*Location: Diamond Ballroom 5, Third Floor*

Facilitators focus on provisions in loan documents that may seem odd or difficult to the loan servicer. Using examples, they address the provisions with an eye toward the borrower's interest as well as the lender's interest and the negotiation that results in the final drafting.

Speakers

**Stacy Ackermann**, *Partner, K&L Gates*

**Elizabeth Burnett**, *CCMS, Senior Portfolio Manager, Newmark Realty Capital, Inc*

1:00 PM - 1:50 PM

**Learning Lab: Reserve Management**

*Location: Diamond Ballroom 6, Third Floor*

Join this Learning Lab to discuss the reserve administration process and workflow, and to evaluate loan document requirements vs. lender/servicer guidelines. Learn about springing reserves, how they are managed, current technologies available to simplify the process, and more.

Topics include: How to manage time lag; do loan docs reflect reality; at what point should the servicer report to investors and is the borrower ever put into default? What is the servicer's leverage, if any, and how does this play with investors?

Speakers

**Terry Bowes**, *Director, Wells Fargo Bank, N.A.*

**Theodore Gandert**, *Manager, Portfolio Operations, Pacific Life Insurance Company*

**Luke Hoffman**, *CCMS, Head of Closing and Servicing Operations, MEMBERS Capital Advisors, CUNA Mutual Group*

1:00 PM - 1:50 PM

**Learning Lab: Viewpoint - Correspondents and Subservicers**

*Location: Diamond Ballroom 4, Third Floor*

Let's take a look at servicing from the point of view of the correspondent or subservicer. See how subservicers and correspondents view the interactions and flow of information needed to address borrower requests and concerns, and learn how the subservicer/correspondent servicer resolve the issue.

Speakers

**Donald F. Howie**, *Director, HFF*

**Jennifer L. Shedden**, *Vice President, Senior Portfolio Manager, Grandbridge Real Estate Capital LLC*

**Chelsea Towner Dunaway**, *Portfolio Manager, Newmark Realty Capital, Inc.*

2:00 PM - 2:50 PM

**General Session: Digital Transformation in Commercial/Multifamily Servicing**

*Location: Diamond Ballroom 4, Third Floor*



What exactly does digital transformation mean and how does it apply to commercial mortgage servicing? Our afternoon general session focuses on digital transformation opportunities and important considerations as you embark on, or continue, your digital transformation journey. Learn how successfully integrating business operations, customer and employee experience and technology can help digitally transform your commercial/multifamily mortgage servicing business.

Speakers

**Joni Brown-Haas**, *President, PGIM Real Estate Finance*

**Steve Robertson**, *Partner, PwC*

2:50 PM - 3:50 PM

**Operations Roundtable (Open to Members; Closed to Media)**

*Location: Platinum Ballroom B, Second Floor*

2:50 PM - 3:00 PM

**Refreshment Break in the Exhibit Area**

*Location: Platinum Ballroom E, Second Floor*

3:00 PM - 4:00 PM

**Closing: Streamlining information**

*Location: Diamond Ballroom 5, Third Floor*

Closing is an area where multiple pieces of information from a variety of external and internal sources must come together to allow the lender to meet the closing date. How do closers manage the information? How is it received, processed and analyzed for closing and how is it relayed to the servicing and asset management teams? Expert panelists discuss this process in view of current technology, and best practices that could benefit the industry.

Speakers

**Shannon Carmack**, *CCMS, Manager-Loan Servicing, Ameritas Investment Partners*

**Scott Keith**, *Managing Director, RealINSIGHT*

**Annie Martin**, *Vice President, Grandbridge Real Estate Capital*

**Sheri Perkins**, *Investment Professional, Nationwide Life Insurance Company*

3:00 PM - 4:00 PM

**GSE Panel: Affordable, Green and Serviceable**

*Location: Diamond Ballroom 4, Third Floor*

Join this session to hear industry experts from the GSEs discuss their mission of providing affordable multifamily rental housing in three historically underserved markets - rural housing, manufactured housing and the preservation of affordable housing, in addition to providing for environmentally responsible multifamily rental housing. Agency Lenders and the leaders from each GSE will discuss the risks and challenges they continue to face, particularly related to updated standards for Green loans, and how they are utilizing innovations in technology and other tools to strengthen their servicing platform.

Speakers

**Jane Ingham**, *Group Vice President, M&T Realty Capital Corporation*

**Michael J. Palmer**, *Senior Vice President, Walker & Dunlop, LLC*

**Leanne Spies**, *Senior Vice President, Asset Management & Operations, Freddie Mac*

**Robert E. Walton**, *Vice President, Multifamily Debt and Equity Asset Management, Fannie Mae*

3:00 PM - 4:00 PM

**Insurance: Adapting Intent to Reality**

*Location: Diamond Ballroom 6, Third Floor*

Given the possibility of misalignment in an insurance policy vs. the loan term, the static nature of the loans and the changing nature of insurance, the drafting of insurance provisions is an art. Hear from insurance professionals who attempt to provide compliant insurance and closers who are concerned with insurance adequacy. Our experts discuss the ongoing need, who the adversary in the insurance servicing relationship is, lender view of risk to the collateral, lender requirements, borrower education and more.

Speakers

**Lindsay Ellingson**, *Commercial Insurance Manager, NorthMarq*

**Craig Hartzog**, *Head of Commercial Servicing, Accenture, LLP*

**Michael McDaniel**, *President, Fortress Risk Consultants, LLC*

**Laura J. Smith**, *Managing Director, Servicing, Newmark Knight Frank*

4:00 PM - 5:30 PM

**Loan Closers Roundtable Meeting (Open to Members; Closed to Media)**

*Location: Platinum Ballroom A, Second Floor*

4:00 PM - 6:30 PM

**mPower Event: Clear Boundaries - Every Business Woman's Essential Safety Guide (Closed to Media)**

*Location: Diamond Ballroom 8, Third Floor*

Best-selling and award-winning author, Christine Beckwith, brings us *Clear Boundaries — Every Business Woman's Essential Safety Guide*. This touching presentation memorializes two female banking professionals Christine personally worked with, and provides you the opportunity to be informed on the greatest dangers and latest safety precautions, through real-life stories. Learn practical and relevant safety tips for every aspect of your active life, and leave with a signed copy of the book!

*Sponsored by: CoreLogic*

#### **Schedule**

4:00 PM – 4:30 PM ***Networking***

4:30 PM – 5:30 PM ***Presentation with Audience Q&A***

5:30 PM – 6:30 PM ***Book Signing***

Speakers

**Christine Beckwith**, *President/COO, 20/20 Vision Your Success Coaching & Consulting*

**Amber Lawrence**, *Associate Director of Education Operations and Programming, Mortgage Bankers Association*

Friday, May 17, 2019

8:00 AM - 10:30 AM

**Registration**

*Location: Platinum Ballroom Foyer, Second Floor*

8:30 AM - 9:00 AM

**Continental Breakfast**

*Location: Diamond Ballroom Foyer, Third Floor*

9:00 AM - 10:30 AM

**Closing General Session: The Leadership Forum (Closed to Media)**

*Location: Diamond Ballroom 4, Third Floor*

Our popular Leadership Forum is back! Top servicers offer opinions regarding the future of the industry, the vision for individual companies, relationship management, technological efficiency and tips on career management and how to get ahead.. Get a business and technology perspective on the status of the industry; trends and opportunities; the impact of regulation; and leadership styles and talent development. Bring your questions and join us for this informative session.

Speakers

**Brett Adams**, *Senior Vice President, Berkadia*

**Paul J. Edgar**, *Senior Investment Professional, Nationwide Life Insurance Company*

**Joe Lovell**, *Senior Vice President and Chief Operating Officer, Grandbridge Real Estate Capital*

**Nicole Malaske**, *AVP, Commercial Insurance Senior Manager, NorthMarq*

**DeAnne Reed**, *AVP, Servicing Operations, Pacific Life Insurance Company*

**Sean D. Reilly**, *Managing Director, Wells Fargo Bank, N.A.*

**Laura J. Smith**, *Managing Director, Servicing, Newmark Knight Frank*

