AGENDA

**Time and Login:**
September 10-11; 1:00 – 4:00 p.m. ET. Login instructions will be sent prior to the symposium

**DAY 1: Thursday, September 10; 1:00 – 4:00 p.m. ET**

1:00 PM
*Welcome and Symposium Overview*
Co-Chairs, MBA’s Human Resources Professional Networking Group:
Tracy Kee, SVP & Director, Comp and HR Systems, Hilltop Holdings
Renee Zabel, Chief People Officer and VP, Human Resources, AmeriFirst Financial

1:15 – 1:30 PM
*Getting Started: Group Polling*
Robert Northway, Partner, McLagan
Marina Walsh, Vice President, Industry Analysis, MBA

1:30 – 2:15 PM
*Wage and Hour Laws and What Can Be Learned from Recent Class Action Activity*
Russell Bruch, Partner, Morgan, Lewis & Bockius LLP
Meredith S. Dante, Partner, Ballard Spahr

- Key Concepts and Developments regarding the Fair Labor Standards Act (FLSA)
  - Available exemptions and their requirements
  - Tracking and accounting for compensable time
  - Calculating overtime pay for loan officers and other mortgage employees
  - Treatment of part-time workers
- CA and other State Laws: Overtime and Minimum Wages
- Litigation Developments and Trends
- Ways to Avoid Wage and Hour Trouble
- Independent Contractor Classification

2:15 – 3:00 PM
*The New 2020 Top Ten - Loan Originator Rules and Compensation Structures*
Justin Wiseman, Associate Vice President, Managing Regulatory Counsel, MBA (moderator)
Richard J. Andreano, Partner, Ballard Spahr LLP
Loretta Salzano, President, Franzen and Salzano

Schedule and speakers subject to change.
Schedule and speakers subject to change.

- Refresher on the LO Compensation Rule and Interpretation
- The Top Ten LO Compensation Scenarios – What We’re Hearing from the Street and What’s Permissible
  - Has the LO Comp Rule Changed?
  - Team and loan officer assistants
  - Issues with bond and construction loans
  - Who is an LO under the rule?
  - And more on what’s allowable, what’s not, and what’s still grey

3:00 PM – 4:00 PM
COVID-Related HR Questions and Legal Office Hours
Russell Bruch, Meredith Dante, Rich Andreano, Loretta Salzano, Justin Wiseman (moderator)

- Summary of COVID-related legal questions being most asked by clients
- Specific areas or return-to-work and remote work that could be problematic for companies
- Suggestions for mitigating legal risk
- Additional legal questions answered as time permits

4:00 PM
Adjourn

DAY 2: Friday, September 11; 1:00 – 4:00 p.m. ET

1:00 PM
Welcome Back

1:00 – 2:00 PM
Shifting Gears: DEI Strategies in a New Era
Lisa Haynes, SVP, Chief Financial Officer and Chief Diversity & Inclusion Officer, MBA (moderator)
Tamara King, Vice President of Residential Policy and Member Engagement, MBA (moderator)
Dana Dillard, Vice President, Corporate Social Responsibility Mr. Cooper
Ulysses Smith, Head of Diversity, Inclusion & Belonging, Blend
Wendy Wilson, Strategic Initiatives, Homebuyers Club/Mortgage Mastery, DHI Mortgage

- Group Polling:
  - How did your company respond to the deaths of George Floyd, Breonna Taylor, and Ahmaud Arbery?
  - What are your three biggest D&I challenges?
  - Does your company have a person or team dedicated to D&I?
If your company has a person/team responsible for D&I, is that person/team in HR?

- Ways that companies have traditionally promoted diversity, inclusion and equality in the workplace
  - What progress has been made?
  - Where have efforts fallen short?
- New initiatives or approaches: How will strategies be different from past strategies?
- Measuring the impact of diversity, inclusion and equality efforts
- Resources for further discussion

2:00 – 2:45 PM
Economic and Mortgage Market Outlook
Mike Fratantoni, Chief Economist and Sr. Vice President, Research & Technology, MBA
Marina Walsh, Vice President of Industry Analysis, MBA

- Employment, GDP, the federal funds rate, consumer prices and other economic indicators affecting the mortgage industry
- Volume and rate forecast
- Loan performance and delinquency trending
- Industry profitability and mortgage company performance – revenues, expenses, and productivity

2:45 – 3:30 PM
Annual Mortgage Banking Compensation Survey Results
Robert Northway, Partner, McLagan
Adrienne Sund, Director, Head of U.S. Consumer Banking, McLagan

- Highlights on what’s changed in latest survey
- Survey results for key sales and fulfillment, servicing and executive management positions
- Pay and performance analyses

3:30 – 4:00 PM
Additional Hot Topics and Wrap-Up
Tracy Kee, Renee Zabel, Rob Northway, Marina Walsh

- Based on Polling on Day 1, discuss other HR Topics requested by attendees
- Announcements and Wrap-Up

4:00 PM
Adjourn

Schedule and speakers subject to change.
MBA's HR Symposium 2020 is intended to meet up to XX SHRM-CP® or SHRM-SCP® credits upon approval by applicable licensing entities.