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.
• 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
  o Has the LO Comp Rule Changed?
  o Teaming and loan officer assistants
  o Issues with bond and construction loans
  o Who is an LO under the rule?
  o 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
Fostering a Diverse, Inclusive and Equitable Workforce
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)
Ulysses Smith, Head of Diversity, Inclusion & Belonging, Blend
Sheri Crosby Wheeler, Vice President, Corporate Social Responsibility Mr. Cooper

• Group Polling:
  o How important is it to your company to have a diverse, inclusive and equitable work environment and workforce?
  o What changes, if any, have you seen in your company’s response to recent events?
• Ways that companies have traditionally promoted diversity, inclusion and equality in the workplace

Schedule and speakers subject to change.
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- 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 its 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

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Schedule and speakers subject to change.