

MBA's  
**HUMAN RESOURCES  
VIRTUAL SYMPOSIUM**  
SEPT. 8-9, 2021



## AGENDA

### **Time and Login:**

September 8-9; 1:00 – 4:30 p.m. ET. Login instructions will be sent prior to the symposium

### **DAY 1: Wednesday, September 8; 1:00 – 4:30 p.m. ET**

#### **1:00 PM**

##### **Welcome and Symposium Overview**

Co-Chairs, MBA's Human Resources Professional Networking Group:

Dee Grosso EVP, Human Resources, Roundpoint

Brandi Jaber, EVP & President Residential Mortgage Division, First Home Bank

#### **1:15 – 1:30 PM**

##### **Getting Started: Group Polling**

Robert Northway, Partner, McLagan

Marina Walsh, Vice President, Industry Analysis, MBA

#### **1:30 – 2:30 PM**

##### **COVID-Related and Return-to-Work Legal Questions**

Russell Bruch, Partner, Morgan, Lewis & Bockius LLP

Meredith S. Dante, Partner, Ballard Spahr

William Kooper, Vice President of State Government Affairs and Industry Relations, MBA

- What COVID-related legal questions are being most asked by clients?
- Specific areas of return-to-work that could be problematic.
  - Employee refusal to return-to-work for health reasons
  - Mandatory vaccinations or healthy reporting; employee privacy
  - Accounting for travel time in compensation
  - Business travel
- Specific areas of remote or hybrid work that could be problematic.
  - Licensing implications
  - State taxation and jurisdiction issues
  - Cost reimbursements
- Mitigating legal risk during the post-pandemic work transition.

#### **2:30 – 3:00 PM**

##### **Break**

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Schedule and speakers subject to change.

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**3:00 – 3:30 PM**

**COVID-Related and Return-to-Work – Office Hours**

Russell Bruch, Partner, Morgan, Lewis & Bockius LLP

Meredith S. Dante, Partner, Ballard Spahr

Bring your questions to this 30-minute Q&A session with our legal experts.

**3:30 PM – 4:30 PM**

**Mortgage-Specific and Other Legal Issues**

Justin Wiseman, Associate Vice President, Managing Regulatory Counsel, MBA (moderator)

Jed Mayk, Partner, Hudson Cook

Rich Andreano, Partner, Ballard Spahr

Meredith S. Dante, Partner, Ballard Spahr

- Refresher on the LO Compensation Rule and Interpretation
  - Scenarios and most current risks
  - Has the LO comp rule changed?
  - More on what's allowable, what's not, and what's still grey
  - How the LO compensation rule ties with fair lending rules. Should we expect more enforcement, given changing CFPB administration?
- 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
  - What's new at the Department of Labor?
- Independent Contractor Classification
- Pay Equity Analyses

**4:30 PM**

**Adjourn**

**DAY 2: Thursday, September 9; 1:00 – 4:30 p.m. ET**

**1:00 PM**

**Welcome Back**

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**1:00 – 1:45 PM**

**Diversity, Equity & Inclusion – Facilitated Discussion Breakouts**

Charmaine Brown, Director, Diversity, Equity and Inclusion, MBA

Brian Woody White, SVP, Chief Diversity & Inclusion Officer, HomeBridge Financial Services, Inc.

- During this breakout discussion, we will divide up into two groups for a discussion based on these questions:
  - How did you measure the impact of diversity, equity and inclusion efforts during the pandemic? Going forward?
  - What are some of the equitable considerations for returning to the office? How are these considerations being addressed?

**1:45 – 2:30 PM**

**Benefits**

Mark Friedman, Partner, AON

- Industry benefit trends gleaned from over 150 financial services organizations.
- What benefit areas or benefit features have seen the most change over the past few years?
- What is the current prevalence data related to high deductible health care plans and other medical plan features?
- What are the current trends in 401(k) plan design?
- What is typical industry practice related to parental and other leave benefits?

**2:30 – 3:00 PM**

**Break**

**3:00 – 3:45 PM**

**Annual Mortgage Banking Compensation Survey Results**

Robert Northway, Partner, McLagan -AON

Adrienne Sund, Associate Partner, McLagan - AON

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

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**3:45 – 4:30 PM**

**Economic and Mortgage Market Outlook**

Joel Kan, Associate Vice President of Economic and Industry Forecasting, 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

**4:30 PM**

**Wrap-Up**

MBA's HR Symposium 2021 will meet up to **6 PDC credits** if participant attends all sessions.



**Mortgage Bankers Association is recognized by SHRM to offer Professional Development Credits (PDCs) for the SHRM-CP® or SHRM-SCP®.**

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