

# State and Local Workshop

Monday, April 7, 2025

7:30 AM - 5:30 PM

## **Registration**

*Location: Capital Terrace*

8:00 AM - 8:30 AM

## **Continental Breakfast**

*Location: Federal Room*

8:30 AM - 9:15 AM

## **Opening General Session: Remarks from MBA Leadership**

*Location: Federal Room*

Hear from MBA's Chief Executive Officer Bob Broeksmit, CMB, on the state of play of the industry and highlights of key MBA initiatives. Bring your questions for an opportunity you don't want to miss!

Speakers

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

**William Kooper, MPA**, *Vice President of State Governmental Affairs and Industry Relations, Mortgage Bankers Association*

**Pete Mills**, *Senior Vice President, Residential Policy and Strategic Industry Engagement, Mortgage Bankers Association*

9:15 AM - 10:15 AM

## **Introductions and Key Workshop Takeaways**

*Location: Federal Room*

Get to know your fellow attendees from across the country as MBA's State and Local Association team outline the Workshop's objectives and invite everyone to introduce themselves.

Speakers

**Liz Facemire**, *Director, State Government Affairs, Mortgage Bankers Association*

**William Kooper, MPA**, *Vice President of State Governmental Affairs and Industry Relations,*

*Mortgage Bankers Association*

**Ainsley Zimmer**, *Senior Specialist, Engagement (State and Local), Mortgage Bankers Association*

10:15 AM - 10:30 AM

**Refreshment Break**

*Location: Federal Room Foyer*

10:30 AM - 11:30 AM

**General Session: Engaging the Next Generation of Home Buyers and Industry Professionals**

*Location: Federal Room*

Join us for an insightful discussion on how to effectively connect with and empower the next generation of home buyers and loan officers. The speakers will share their expertise on understanding the trends, behaviors, and cultural nuances of younger generations, including how to utilize social media and other digital tools.

Speakers

**Ally Carty**, *National Social Media Manager, Guild Mortgage Company*

**Ashley Yarabinec, CMB, AMP**, *Director of Member Relations, Mortgage Bankers Association*

11:30 AM - 12:00 PM

**Coffee Talk Breakout Session**

*Location: Federal Room*

Share your thoughts and collaborate with peers in this facilitated discussion on topics from the Engaging the Next Generation of Home Buyers and Industry Professionals session.

Speakers

**Jennifer Colwell**, *Executive Director, Mortgage Bankers Association of Metropolitan Washington, DC, Inc.*

**Alan Fowler, CMB, AMP**, *Chair, MBA State and Local Committee; MBA State Ambassador, NM; and President, Fowler Financial Education and Consulting*

**Joanne K. Misuraca**, *Chief Executive Officer, Michigan Mortgage Lenders Association*

**Ainsley Zimmer**, *Senior Specialist, Engagement (State and Local), Mortgage Bankers Association*

12:00 PM - 12:10 PM

**Mini Session: Maximizing Member Value – The Power of Commercial Real Estate Finance for State Mortgage Banking Associations**

*Location: Federal Room*

Hear from MBA's Senior Vice President of Commercial/Multifamily Policy and Strategic Industry Engagement Jamie Woodwell on how commercial real estate finance membership can offer growth opportunities for your association.

Speaker

**Jamie Woodwell**, *Senior Vice President of Commercial/Multifamily Policy and Strategic Industry Engagement, Mortgage Bankers Association*

12:10 PM - 1:15 PM

**Networking Lunch**

*Location: Federal Room*

1:15 PM - 2:00 PM

**General Session: Certified Mortgage Bankers (CMBs) and Your Association's Success**

*Location: Federal Room*

Certified Mortgage Bankers (CMBs) are powerful resources for your association in communicating the unique value of your organization as well as the benefits of active engagement in its committees and events. Learn how CMBs can help build a foundation for success for your association and how to direct more members down the path of CMB certification.

Speakers

**Joseph Doyle, CMB, AMP**, *Midwestern Vice Chair, MAA; MBA State Ambassador for Wisconsin; Past President of the Wisconsin Mortgage Bankers Association; and Divisional Vice President, Arch MI*

**Tammie L. Gravlee, CMB, AMP**, *President, Mortgage Division, Bank of Tennessee*

**Kate McDougall, CMB, AMP**, *Vice President, Regional Mortgage Production, Lake Michigan Credit Union*

**Bob Niemi, CMB**, *Director of Government Affairs, Weiner Brodsky Kider PC*

2:00 PM - 2:30 PM

**Coffee Talk Breakout Session**

*Location: Federal Room*

Share your thoughts and collaborate with peers in this facilitated discussion on topics from the CMBs and Your Association's Success session.

Speakers

**Jennifer Colwell**, *Executive Director, Mortgage Bankers Association of Metropolitan Washington, DC, Inc.*

**Alan Fowler, CMB, AMP**, *Chair, MBA State and Local Committee; MBA State Ambassador, NM; and President, Fowler Financial Education and Consulting*

**Joanne K. Misuraca**, *Chief Executive Officer, Michigan Mortgage Lenders Association*

**Ainsley Zimmer**, *Senior Specialist, Engagement (State and Local), Mortgage Bankers Association*

2:45 PM - 3:30 PM

**General Session: Advocacy as Your Association's Cornerstone – Amplifying Impact and Member Value**

*Location: Federal Room*

Join industry experts and advocacy leaders to explore how effective advocacy can elevate your association's value proposition and strengthen its influence. This session will cover practical strategies for organizing state lobby days, building relationships with legislative staff, optimizing legislative committee management, fostering grassroots participation, enhancing PAC fundraising, and leveraging member expertise for policy influence.

Speakers

**Betty Knecht**, *Executive Director, Colorado Mortgage Lenders Association*

**Erika Martens**, *Advocacy Chair, Oklahoma MBA, and Chief Financial Officer, FirstTrust Home Loans, Inc.*

**Jay Pascoe**, *Executive Director & Chief Operating Officer, Ohio Mortgage Bankers Association, Inc.*

**Debbie J. Sousa**, *Executive Director, Massachusetts Mortgage Bankers Association, Inc.*

3:30 PM - 4:00 PM

**Coffee Talk Breakout Session**

*Location: Federal Room*

Share your thoughts and collaborate with peers in this facilitated discussion on topics from the Advocacy as Your Association's Cornerstone session.

Speakers

**Jennifer Colwell**, *Executive Director, Mortgage Bankers Association of Metropolitan Washington, DC, Inc.*

**Alan Fowler, CMB, AMP**, *Chair, MBA State and Local Committee; MBA State Ambassador, NM; and President, Fowler Financial Education and Consulting*

**Joanne K. Misuraca**, *Chief Executive Officer, Michigan Mortgage Lenders Association*

**Ainsley Zimmer**, *Senior Specialist, Engagement (State and Local), Mortgage Bankers Association*

4:00 PM - 4:15 PM

**Refreshment Break**

*Location: Federal Room Foyer*

4:15 PM - 5:00 PM

**General Session: Exploring Operational Excellence in Associations**

*Location: Federal Room*

How is your association addressing its operational and administrative challenges? In this dynamic session, both new and experienced association leaders will share innovative ideas and insights on effective association management, including how to harness new technologies such as artificial intelligence.

Speakers

**Ashley 'Alli' Cassetty**, *Executive Director, Mortgage Bankers Association of Louisville and Mortgage Bankers Association of Kentucky*

**Marianne Collins**, *Former Executive Director, OH and NY State MBAs; Underwriting Trainer, KensieMae LLC*

**Joseph Culver**, *Executive Director, New York Mortgage Bankers Association, Inc.*

**Denisha M. George, MBA**, *Association Executive Director, Confluent Strategies*

**Scott Norman**, *CEO, Texas Mortgage Bankers Association*

5:00 PM - 5:30 PM

**Coffee Talk Breakout Session**

*Location: Federal Room*

Share your thoughts and collaborate with peers in this facilitated discussion on topics from the Exploring Operational Excellence in Associations session.

**Speakers**

**Jennifer Colwell**, *Executive Director, Mortgage Bankers Association of Metropolitan Washington, DC, Inc.*

**Alan Fowler, CMB, AMP**, *Chair, MBA State and Local Committee; MBA State Ambassador, NM; and President, Fowler Financial Education and Consulting*

**Joanne K. Misuraca**, *Chief Executive Officer, Michigan Mortgage Lenders Association*

**Ainsley Zimmer**, *Senior Specialist, Engagement (State and Local), Mortgage Bankers Association*

5:30 PM - 6:30 PM

**Networking Reception**

*Location: North Gate Grill*

Tuesday, April 8, 2025

6:00 AM - 7:00 AM

**MBA's Sunrise 5K Run/Walk**

*Location: Capital Hilton Lobby*

Kickstart your Tuesday with a scenic run/walk around the National Mall, where you can network with colleagues while soaking in the monuments. Get your dose of fresh air and connection – join MBA Runs for a morning jog or walk that's sure to invigorate both body and mind! Learn more and sign-up here: <https://forms.office.com/r/jEd9gc8ydk>

7:30 AM - 8:00 AM

**Breakfast**

*Location: Federal Room*

7:30 AM - 10:15 AM

**Registration**

*Location: Capital Terrace*

8:00 AM - 9:15 AM

**Coffee Talk Super Session**

*Location: Federal Room*

Always a workshop favorite, this facilitated discussion is your time to explore challenges, exchange ideas, and share best practices with your peers.

Speakers

**Jennifer Colwell**, *Executive Director, Mortgage Bankers Association of Metropolitan Washington, DC, Inc.*

**Alan Fowler, CMB, AMP**, *Chair, MBA State and Local Committee; MBA State Ambassador, NM; and President, Fowler Financial Education and Consulting*

**Joanne K. Misuraca**, *Chief Executive Officer, Michigan Mortgage Lenders Association*

**Ainsley Zimmer**, *Senior Specialist, Engagement (State and Local), Mortgage Bankers Association*

9:15 AM - 10:15 AM

**General Session: Real Estate Finance and State Policy – Current Trends and Predictions**

*Location: Federal Room*

Join MBA's Director of State Government Affairs Liz Facemire for an in-depth session featuring leading state policy experts who will analyze the most recent legislative developments and regulatory changes in state capitols. Discover how these trends are shaping the real estate finance industry and stay informed on the challenges and opportunities that lie ahead.

Speakers

**Liz Facemire**, *Director, State Government Affairs, Mortgage Bankers Association*

**James Fulgenzi**, *Director of Government Affairs & Advocacy, Proof*

**Tara Healy, CMB, CML**, *MBA State Ambassador for Colorado; Chief Compliance Officer, Lennar Mortgage*

**Angela Mahfouz**, *Director, State Government Affairs, Rocket Mortgage, LLC*

**Joshua Weinberg, CMCP, *President, Firstline Compliance, LLC***