

State and Local Workshop

Monday, April 13, 2026

7:30 AM - 8:30 AM

Continental Breakfast

Location: River Birch Ballroom Foyer, Meeting Room Level

Start strong with your choice of breakfast favorites before the sessions begin.

7:30 AM - 5:30 PM

Registration & Badge Pick-up

Location: River Birch Ballroom Foyer, Meeting Room Level

MBA Staff members are ready to greet you, assist you with badge pick-up and the MBA Events app, and answer any questions you may have.

8:30 AM - 9:15 AM

Opening General Session: Remarks from MBA Leadership

Location: River Birch Ballroom, Meeting Room Level

Hear from MBA's leadership 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 Government 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

General Session: Introductions and Key Workshop Takeaways

Location: River Birch Ballroom, Meeting Room Level

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

Speakers

Liz Facemire, *Associate Vice President, State Government Affairs, Mortgage Bankers Association*

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

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

10:15 AM - 10:30 AM

Refreshment Break

Location: River Birch Ballroom Foyer, Meeting Room Level

10:30 AM - 11:30 AM

General Session: Tomorrow is Here – How State and Local Associations Can Rise to the Moment

Location: River Birch Ballroom, Meeting Room Level

Join us for an energizing conversation on navigating change and shaping the future of the industry, grounded in insights from work with real estate finance associations nationwide. Reflect on your association’s vital role in meeting evolving industry needs, explore practical ways to rise to the challenge, and leave motivated to put the “Change Equation” into action.

Speakers

Rebecca Lorenz, *CEO and Founder, Infinite Success Strategies, Vice President, MegaStar Financial Corp.*

Steve Richman, *Business Strategist and Industry Influencer*

11:30 AM - 12:00 PM

General Session: AI Tools for Association Excellence

Location: River Birch Ballroom, Meeting Room Level

Explore how practical, accessible AI tools can help state and local association leaders dramatically reduce time spent on routine tasks while expanding the volume and quality of member-facing content. Attendees will see real-world examples and a live demo with an AI expert on how AI can streamline communications, support advocacy and education efforts, and help associations do more with limited staff and volunteer resources.

Speaker

Andrew Hooper, *Associate Vice President, Strategic Partnerships & Innovation, FNF Family of*

Companies

12:00 PM - 1:15 PM

Networking Lunch and Program: Leveraging MBA Programs to Expand Revenue Opportunities

Location: River Birch Ballroom, Meeting Room Level

Connect with your peers over lunch, then hear from featured speakers at 1:00 PM. Explore partnership ideas with MBA's Education, mPact, and mPower programs to unlock new revenue opportunities and expand your association's member offerings and value proposition. Through a series of fast-paced, dynamic presentations, MBA staff members highlight existing efforts with states, their successes, and new ideas to improve your bottom line. Sponsored by Winnow.

Speakers

Kelli Burke, *Vice President, Commercial Real Estate Finance | Policy & Strategic Industry Engagement, Mortgage Bankers Association*

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

Venita J. Murray, MBA, AMP, *Director, Member Relations - Membership & Meetings, Mortgage Bankers Association*

David Upbin, *Vice President, Education and Strategy, Mortgage Bankers Association*

1:15 PM - 1:45 PM

General Session: Beyond Borders – Successful Case Studies in Association Collaboration

Location: River Birch Ballroom, Meeting Room Level

Hear from two state association leaders as they share their successes in partnering with other state and local associations to expand membership, replicate high-impact programs and initiatives, engage young professionals, and strengthen their advocacy strategy. The discussion showcases what can be achieved when associations collaborate across state lines to amplify their impact, even when they differ in resources, size, and structure.

Speakers

Ashley Logan, AMP, *Director of Strategic Lending Initiatives & Advocacy, Eustis Mortgage Corporation*

Scott Norman, *Chief Executive Officer, Texas Mortgage Bankers Association*

1:45 PM - 2:45 PM

Structured Coffee Talk: Association Management and Organization

Location: River Birch Ballroom, Meeting Room Level

Explore how peer associations are tackling similar organizational challenges with solutions that are anything but one-size-fits-all. In this moderated, highly interactive session, participants will break out to discuss their approaches to board, membership, and committee structure and management, and leave with a menu of adaptable ideas to tailor to their association, rather than a single prescribed model.

Speakers

Jennifer Colwell, *Executive Director, MBA of Metropolitan Washington and Maryland Mortgage Bankers and Brokers Association, Senior Manager, RMK Productions*

Michelle Mendez, *President of the Mortgage Bankers Association of Central Florida, Account Manager at Arch Mortgage Insurance Company*

Joanne K. Misuraca, *Chief Executive Officer, Michigan Mortgage Lenders Association, Co-Chair, State Relations Committee*

2:45 PM - 3:00 PM

Refreshment Break

Location: River Birch Ballroom Foyer, Meeting Room Level

3:00 PM - 3:45 PM

General Session: Beyond Dues – Creative Ways to Drive Revenue and Member Value

Location: River Birch Ballroom, Meeting Room Level

Discover how associations are leveraging creative programs—such as Future Leaders initiatives, compliance and education webinars, and executive forums—to generate revenue, strengthen member connections, engage young professionals, and advance the industry. This session offers actionable ideas for engaging members, enhancing experiences, and growing non-dues income.

Speakers

Dana Abernathy, CMB, AMP, *MBA Ambassador of Tennessee, Vice President, Servicing Business Development, Cornerstone Servicing*

Aimee Macilveen, CMB, AMP, *President, Tennessee Mortgage Bankers Association, Loan Officer, a Mortgage Boutique*

Deb Meogrossi, *Advisory Council Liaison, Colorado Mortgage Lenders Association, Consultant, Mortgage Forums, LLC*

Katelyn Watkins, *President, Mortgage Bankers Association of the Bluegrass, Kentucky, Loan Officer, Lower*

3:45 PM - 4:30 PM

General Session: What's Fresh, What Works for Successful Conferences

Location: River Birch Ballroom, Meeting Room Level

Discover what's profitable, new, and engaging at conferences. Hear from a panel of association professionals and volunteers on effective speakers, creative sponsorship ideas, innovative programming, strategies to energize young professionals, and ways to keep events engaging and relevant for all participants.

Speakers

Simin Bhagat, *MBA of the Carolinas, MBA of Mississippi, Association Executive Director, Confluent Strategies*

Paul Gigliotti, *Chief Executive Officer, California Mortgage Bankers Association, Executive Strategic Advisor, Prudent AI*

Diane VanOverbeke, *Treasurer, Idaho Mortgage Lenders Association, Senior Loan Officer, Movement Mortgage*

Dawn Williams, AMP, *Vice President, Conference Programs and Experiences, Mortgage Bankers Association*

4:45 PM - 5:30 PM

General Session: Inside State Advocacy – The Mechanics of Your Association's Indispensable Role

Location: River Birch Ballroom, Meeting Room Level

This panel explores how state associations operationalize advocacy as their core value proposition. Panelists highlight how they mobilize members, leverage legislative and regulatory committees, communicate timely policy updates, collaborate with the national MBA at the state level, and host events that directly advance industry advocacy priorities.

Speakers

Joseph Culver, *Executive Director & Chief Operating Officer, New York Mortgage Bankers*

Association, Inc.

Liz Facemire, *Associate Vice President, State Government Affairs, Mortgage Bankers Association*

Alan Fowler, CMB, AMP, *MBA's New Mexico Ambassador; Founder and President, Fowler Financial Education and Consulting, Director of Client Success, Garris Horn LLP*

Bob Niemi, CMB, *MBA Ambassador of Florida, Residential Vice Chair, MBA State Legislative and Regulatory Committee, Director of Government Affairs, Weiner Brodsky Kider PC*

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

5:30 PM - 6:30 PM

Networking Reception

Location: Magnolia Ballroom, Lobby Level

Continue the day's conversation over a beverage and light bite with your peers before you head out for the evening.

Tuesday, April 14, 2026

7:30 AM - 8:00 AM

Continental Breakfast

Location: River Birch Ballroom Foyer, Meeting Room Level

Start strong with your choice of breakfast favorites before the sessions begin.

7:30 AM - 10:15 AM

Registration & Badge Pick-Up

Location: Rock Creek Registration Desk, Ballroom Level

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8:00 AM - 9:00 AM

Coffee Talk Super Session

Location: River Birch Ballroom, Meeting Room Level

What did we miss yesterday? Always a workshop favorite, this facilitated discussion is your time to explore unique challenges, exchange ideas, and share best practices with your peers.

Speakers

Angela Muxworthy, CMB, *Treasurer, New Mexico Mortgage Lenders Association, Vice President, Mortgage Production, Nusenda Credit Union*

Michael A. Olden, *Emeritus President, Washington Mortgage Banker Association, Corporate Account Manager, Advantage Partner Solutions*

9:00 AM - 9:15 AM

General Session: MBA Opens Doors Partnership Opportunities with Your Association

Location: River Birch Ballroom, Meeting Room Level

In this brief session, learn how your association can engage with MBA Opens Doors, the foundation providing housing stability for families caring for critically ill children. Hear practical examples of how associations have partnered with Opens Doors to advance its important mission, while strengthening their association's commitment to social impact and reputation as a trusted community partner.

Speakers

Deborah Dubois, *President of MBA Opens Doors Foundation, Mortgage Bankers Association*

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

9:15 AM - 10:15 AM

General Session: Trends and Hot Topics in the State Legislative and Regulatory Landscape

Location: River Birch Ballroom, Meeting Room Level

Join state policy experts for an in-depth session analyzing the most recent legislative developments and regulatory changes in state capitals, including artificial intelligence, the Community Reinvestment Act, dormant mortgages, commercial/multifamily issues, and more. Discover how these trends are shaping the real estate finance industry and what challenges and opportunities may lie ahead.

Speakers

Dahlia Brennan, *Senior Specialist, Commercial/Multifamily Policy and Strategic Industry Engagement, Mortgage Bankers Association*

Joe Doyle, CMB, AMP, *Co-Chair, State Relations Committee; MBA Ambassador of Wisconsin; MAA Midwest Vice Chair, Divisional Vice President, Arch Mortgage Insurance Company*

Liz Facemire, *Associate Vice President, State Government Affairs, Mortgage Bankers Association*

Conor Fennessy, *Director, Government Affairs, Rocket Mortgage, LLC*

Matthew VanFossen, CMB, *Chair, MBA State Legislative and Regulatory Committee; Past President/ Secretary of the MBA of New Jersey, Chief Executive Officer, Absolute Home Mortgage Corporation*

Nanci L. Weissgold, Esq., *MBA's 2025-2026 MORPAC Chair; Co-Chair, Financial Services Group, Alston & Bird, LLP*