AGENDA


DAY 1: Wednesday, September 6

8:00 AM
Registration Begins; Continental Breakfast

8:30 AM – 9:00 AM
Welcome and Introductions
Robert Northway, Partner and Head of Consumer Banking Global RE Practice, McLagan
Marina Walsh, CMB, Vice President, Industry Analysis, Mortgage Bankers Association

- Attendee Introductions
- Key Attendee Takeaways

9:00 AM – 11:00 AM
Remote Work Super Session: Legal, Operational, and Tax and Accounting Perspectives

Speakers:
Blake Boss, Executive Vice President, ActiveComply
Russell Bruch, Partner, Morgan, Lewis & Bockius LLP
Brian M. Howe, Partner, Plante & Moran PLLC
Meredith S. Dante, Partner, Ballard Spahr
Liz Facemire, Director, State Government Affairs, Mortgage Bankers Association

- Remote and hybrid work considerations
  - Licensing implications
  - Employee monitoring (dual employment; work rate)
  - Compensation adjustments for remote vs in-office
  - Business travel
- State salary disclosure laws
- Accounting and Tax Issues of Remote Work
  - State taxation and jurisdiction issues
  - Cost reimbursements

Schedule and speakers subject to change.
11:00 – 11:15 AM
Break

11:15 AM – 12 NOON
Fair Labor Standards Act Update

Speakers:
Russell Bruch, Partner, Morgan, Lewis & Bockius LLP
Meredith S. Dante, Partner, Ballard Spahr

- What’s new at the Department of Labor?
- 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
- Independent contractor rulemaking

12 NOON – 1:00 PM
Lunch

1:00 PM – 2:30 PM
Loan Originator Compensation and Other Mortgage-Specific Legal Issues Affecting HR Managers

Speakers
Justin Wiseman, Associate Vice President, Managing Regulatory Counsel, MBA (moderator)
Rich Andreano, Practice Leader, Ballard Spahr’s Mortgage Banking Group
Crystal Gray, SVP Associate General Counsel, Planet Home Lending

- LO Compensation rule and interpretations
- Employee onboarding and offboarding
- Other mortgage-specific legal issues related to mortgage industry employment

2:30 PM – 2:45 AM
Break

2:45 PM – 3:15 PM
Legal Office Hours

- Bring your specific questions to this Q&A session with our legal experts, moderated by MBA’s own Managing Regulatory Counsel, Justin Wiseman

3:15 – 4:45 PM
Discussion Breakout Sessions

Schedule and speakers subject to change.
Smaller group discussions on a variety of hot topics with short summary presentations to all attendees

Topics may include:
- HR Systems and Technology: Payroll, Employee Monitoring and Tracking, LO Compensation, BI Tools
- Employment Contracts: LO Onboarding & Offboarding Procedures, Non-Competes, Non-Solicits
- Employee Recruitment, Turnover, and Succession Planning
- Biggest Complaints from LOs and What to Do about It
- Fostering an Inclusive Workforce
- Building Company Culture in Post-Pandemic Work Environment
- Employee Benefits - Education, Health, Retirement etc.
- Other Legal Issues

5:00 PM
Adjourn

6:00 PM – 7:30 PM
Networking Reception

DAY 2: Thursday, September 7

8:00 AM
Continental Breakfast

8:15 AM – 8:30 AM
MBA HR Networking Group Co-Chair Welcome and Member Feedback
Jenny Masoud, Director, Analytics, Mortgage Bankers Association
Katie Caggiano, Senior Incentive Strategy and Analytics Manager, VP, Citizens Bank
Cheryl Lieber, Chief Administrative Officer, Nations Lending Corp
8:30 AM – 9:15 AM  
**Breakfast Keynote: Recruiting, Building and Developing a Diverse and Inclusive Workplace**

Speakers:
Amber Lawrence, Associate Vice President, Diversity, Equity and Inclusion
Lamont Watson, Vice President of Diversity Talent Development, Guild Mortgage Company

9:15 AM – 10:00 AM  
**Mortgage Market Outlook**

Speakers:
Joel Kan, Vice President and Deputy Chief Economist, Industry Surveys and Forecasts
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

10:00 AM – 10:45 AM  
**Panel Discussion on Sales and Other Strategies in a Tough Market Environment**

Speakers:
Cheryl Lieber, Chief Administrative Officer, Nations Lending Corp
Katie Caggiano, Senior Incentive Strategy and Analytics Manager, VP, Citizens Bank
Mari Denton, VP, Incentive & Analytic Solutions at SimpleNexus, LLC, an nCino Company

10:45 – 11:00 AM  
**Break**

11:00 AM – 12 NOON  
**Mortgage Banking Compensation Survey Results**  
(Open to Participants in the Compensation Survey Program conducted by McLagan - AON)

Speakers:
Robert Northway, Partner, McLagan
Adrienne Sund, Associate Partner, Head of U.S. Consumer Banking, McLagan

- Production
  - Survey Results for Key Sales and Fulfillment Positions
  - Pay and Performance Analyses

Schedule and speakers subject to change.
• Loan Servicing
  o Survey Results for Default, Call Center and Other Servicing Positions
  o Trends in Offshoring and Outsourcing
• Executive Management and Support Functions
  o Compliance and Risk
  o HR Organizational Structures
• Roundtable Discussions and Market-Trend Polling

12:00 NOON
Adjourn

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