

MBA's
HUMAN RESOURCES
SYMPOSIUM 2024



AGENDA

Location:

Mortgage Bankers Association Headquarters

1919 M St NW, Floor B1, Washington, DC 20036

DAY 1: Wednesday, September 18

8:00 AM

Registration Begins; Continental Breakfast

8:30 AM – 9:15 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

9:15 AM – 10:30 AM

Fair Labor Standards Act and 2024: New Rules, New Headaches

Speakers:

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

- New thresholds and timing for overtime rules from the Department of Labor
- How employers intend to implement changes
 - Changing exempt vs. non-exempt status
 - Increasing salary to new thresholds
- Implications of new rules to the duties test
- Tracking and accounting for compensable time
- Calculating overtime pay for loan officers and other mortgage employees
- State vs. Federal overtime laws

Schedule and speakers subject to change.

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10:30 – 10:45 AM

Break

10:45 AM – 12 NOON

Remote Work Super Session: Legal, Operational, and Tax and Accounting Perspectives

Speakers:

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

12 NOON – 1:00 PM

Lunch

1:00 PM – 2:30 PM

The Loan Originator Compensation Rule and Other Regulatory and Legal Developments

Speakers

Justin Wiseman, Vice President for Residential Policy, Managing Regulatory Counsel

Public Policy and Industry Relations, MBA (moderator)

Rich Andreano, Practice Leader, Ballard Spahr's Mortgage Banking Group

- The State and Future of the CFPB
- LO Compensation rule and interpretations
- NAR Settlement Impact
- Employee Behavior and Fair Lending
- Other mortgage-specific legal issues related to mortgage industry employment

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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

Led by:

- Speakers from previous sessions
 - Rick Hill, VP, Information Technology
 - Amber Lawrence, AVP, Diversity, Equity & Inclusion
 - Ashley Reid, DEI Specialist, Diversity, Equity & Inclusion
- 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
 - HR and Artificial Intelligence: How are AI Tools Being Used by HR Managers?
 - Employment Contracts: LO Onboarding & Offboarding, Non-Competes, Non-Solicits
 - Employee Recruitment, Turnover, and Succession Planning
 - Employee Mental Health Resources
 - Building Company Culture and Fostering Inclusiveness
 - Employee Benefits - Education, Health, Retirement etc.
 - Other Legal Issues

5:00 PM

Adjourn

5:30 PM – 6:30 PM

Networking Reception: City Tap House Dupont, 1250 Connecticut Ave., Washington DC

AON

Schedule and speakers subject to change.

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DAY 2: Thursday, September 19

8:00 AM

Continental Breakfast

8:30 AM – 9:30 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

9:30 AM – 10:15 AM

Human Resource Executive Perspectives Panel

Speakers:

Jenny Masoud, Director, Analytics, MBA, (moderator)

Co-Chairs Emeritus, MBA's HR Networking Group

Cheryl Lieber, Chief Administrative Officer, Nations Lending Corp

Katie Caggiano, Senior Incentive Strategy and Analytics Manager, SVP, Citizens Bank

Incoming Co-Chairs, MBA's HR Networking Group

Jodi Bailey, SVP Total Rewards and HRIS, Planet Home Lending

Emily Harvey, Chief Human Resources Officer, Flat Branch Mortgage, Inc.

- What keeps Human Resources executives up at night?
- How has the role of an HR executive changed?
- How have employee needs changed?
- Industry profitability and mortgage company performance – revenues, expenses, and productivity

10:15 – 10:30 AM

Break

10:30 AM – 12 NOON

Schedule and speakers subject to change.

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Mortgage Banking Compensation Survey Results (Open to All Symposium Attendees)

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
- Loan Servicing
 - Survey Results for Default, Call Center and Other Servicing Positions
 - Trends in Offshoring and Outsourcing
- Executive Management and Support Functions
 - Compliance and Risk
 - HR Organizational Structures
- Roundtable Discussions and Market-Trend Polling

12:00 NOON

Adjourn

MBA's HR Symposium 2024 is intended to qualify for **SHRM-CP®** or **SHRM-SCP®** credits upon approval by applicable licensing entities.



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