

# State and Local Workshop

Monday, March 18, 2024

7:30 AM - 5:30 PM

## **Registration**

*Location: 3B Registration Desk*

8:00 AM - 8:30 AM

## **Continental Breakfast**

*Location: Constitution Ballroom CDE Foyer, Constitution Level*

8:30 AM - 9:15 AM

## **OPENING GENERAL SESSION: Remarks from MBA Leadership**

*Location: Constitution Ballroom CDE, Constitution Level*

Join MBA's Senior Vice President of Residential Policy and Strategic Industry Engagement, Pete Mills, as he sits down with MBA's President and Chief Executive Officer Bob Broeksmit, CMB, for an interview on the state of play of the industry and highlights key MBA initiatives. Bring your questions for a conversation 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*

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

9:15 AM - 10:15 AM

## **Introductions and Key Workshop Takeaways**

*Location: Constitution Ballroom CDE, Constitution Level*

Get to know your fellow attendees from across the country as MBA's lead liaison with state and local associations, Anthony Siller, outlines the workshop objectives and invites everyone to introduce themselves.

Speaker

**Anthony Siller, Sr. Specialist**, *State & Local Association Engagement, Mortgage Bankers Association*

10:15 AM - 10:30 AM

**Refreshment Break**

*Location: Constitution Ballroom CDE Foyer, Constitution Level*

10:30 AM - 11:30 AM

**GENERAL SESSION: Amplify Your Associations Impact**

*Location: Constitution Ballroom CDE, Constitution Level*

Hear from NAMMBA Founder and CEO Tony Thompson as he discusses keyways to partner and leverage your association's relationships to provide training, education and career development to the real estate finance industry, which align and support home ownership in the communities you serve.

Speaker

**Tony Thompson, III, CMB, AMP, Founder & Chief Executive Officer, NAMMBA National Association of Minority Mortgage Bankers of America**

11:30 AM - 12:00 PM

**Coffee Talk Mini Session**

*Location: Constitution Ballroom CDE, Constitution Level*

Participate in this guided discussion to share your thoughts and collaborate with peers on topics from the Amplify Your Association's Impact session.

Speaker

**Anthony Siller, Sr. Specialist, State & Local Association Engagement, Mortgage Bankers Association**

12:00 PM - 1:15 PM

**Networking Lunch**

*Location: Constitution Ballroom CDE Foyer, Constitution Level*

1:15 PM - 2:00 PM

**GENERAL SESSION: Effective Strategies to Meet Your Association's Operational and Administrative Needs**

*Location: Constitution Ballroom CDE, Constitution Level*

Professional staff, volunteers, or association management? What is your association doing to meet its operational and administrative needs? In this session, you will hear from three association leaders as they discuss the benefits and challenges resulting from their association's organization and structure.

Speakers

**Caitlin Guerra**, *Association Executive Director, Confluent Strategies*

**Julie Haddock**, *Senior Vice President, Market Leader, BOK Financial*

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

**Andrew Leavitt, CRU**, *President, Board of Directors, Nevada Mortgage Lenders Association, Inc.*

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

2:00 PM - 2:30 PM

**Coffee Talk Mini Session**

*Location: Constitution Ballroom CDE, Constitution Level*

Participate in this guided discussion to share your thoughts and collaborate with peers on topics from the Effective Strategies to Meet Your Association's Operational and Administrative Needs session.

Speaker

**Anthony Siller**, *Sr. Specialist, State & Local Association Engagement, Mortgage Bankers Association*

2:45 PM - 3:30 PM

**GENERAL SESSION: Helping Members Find Value in a Down Market**

*Location: Constitution Ballroom CDE, Constitution Level*

In today's challenging market, state and local associations are more important than ever. In this session, industry stakeholders will discuss what is most important for members as they navigate market turbulence and touch on how associations can think outside the box in terms of delivering member value.

Speakers

**Joel Bisailon, Jr.**, *Director of Client Growth Strategy, SVP, Sandy Spring Bank dba Sandy Spring Mortgage*

**Jennifer Green, CMB, AMP**, *Assistant Director - SF Loan Operations, Tennessee Housing Development Agency*

**Laura Hopkins**, *Vice President, Membership, Mortgage Bankers Association*

3:30 PM - 4:00 PM

**Coffee Talk Mini Session**

*Location: Constitution Ballroom CDE, Level 3B*

Participate in this interactive discussion to share your thoughts and collaborate with peers on topics from the Finding the Value in a Down Market session.

Speaker

**Anthony Siller**, *Sr. Specialist, State & Local Association Engagement, Mortgage Bankers Association*

4:15 PM - 5:00 PM

**GENERAL SESSION: Education Opportunities for State and Local Associations**

*Location: Constitution Ballroom CDE, Constitution Level*

Offering effective training to your members can propel the next generation of mortgage bankers. Learn how associations leverage learning and development opportunities and hear an update on MBA's Mortgage Banking Bound program.

Speakers

**Karley Bond, CMB, AMP**, *SVP, Area Manager, Market Executive, Regions Financial Corporation / Regions Mortgage*

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

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

5:00 PM - 5:30 PM

**Coffee Talk Mini Session**

*Location: Constitution Ballroom CDE, Constitution Level*

Participate in this guided discussion to share your thoughts and collaborate with peers on topics from the Education Opportunities for State Associations session.

Speaker

**Anthony Siller**, *Sr. Specialist, State & Local Association Engagement, Mortgage Bankers Association*

5:30 PM - 6:30 PM

**Networking Reception**

*Location: Cabinet, Declaration Level*

Join us as we continue this afternoon's conversation with a refreshing beverage or light snack at our Networking Reception. We're excited to welcome our Residential Future Leaders and CMBs to join us.

Tuesday, March 19, 2024

7:30 AM - 8:00 AM

**Breakfast**

*Location: Constitution Ballroom CDE Foyer, Constitution Level*

8:00 AM - 9:15 AM

**Coffee Talk Super Session**

*Location: Constitution Ballroom CDE, Constitution Level*

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

Speaker

**Alan Fowler, CMB, AMP, Senior Vice President, Mortgage Services, Nusenda Credit Union**

9:15 AM - 10:15 AM

**GENERAL SESSION: The Mechanics of Successful Advocacy and Political Engagement**

*Location: Constitution Ballroom CDE, Constitution Level*

Hear from MBA experts and advocacy leaders as they discuss ways to give your association a powerful voice. Topics will include planning a state lobby day, managing your legislative committee, advocacy engagement, and best practices for operating your association's political action committee.

Speakers

**Yvette Clermont, CMB, AMP, Branch Manager and Mortgage Consultant, Novus Home Mortgage**

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

**Alicia Goncalves, CMB, Director of Associate Membership, Mortgage Bankers Association**

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

**George Rogers, Vice President of Legislative Affairs, Mortgage Bankers Association**

