



# Commercial/Multifamily Finance Convention and Expo

**Sunday, February 9, 2025**

**9:00 AM - 7:00 PM**

**Registration**

*Location: Palm Foyer*

**11:00 AM - 12:00 PM**

**Finance & Audit Committee Meeting (Committee Members Only)**

*Location: La Jolla A*

**12:00 PM - 5:00 PM**

**Headshot Caf  **

*Location: Seaport Ballroom Foyer*

Stop by our professional photographer for a new headshot, complete with a makeup touchup. You'll receive the image file to update your social media presence. No additional fee. Sponsored by Grandbridge.

**12:00 PM - 5:00 PM**

**LinkedIn Profile Consultations**

*Location: Seaport Ballroom Foyer*

Sign up for a 15-minute LinkedIn Profile Consultation with an expert coach. Find out what your profile says about you and learn strategies to build and engage your network. Sponsored by Goldman Sachs. Sign up: <https://calendly.com/dwcs/mbacref25>

**2:00 PM - 3:30 PM**

**Commercial Lenders Roundtable (Committee Members Only)**

*Location: Harbor F*

**2:00 PM - 3:30 PM**

**Investment Committee Meeting (Open to Members)**

*Location: La Jolla A*

**2:00 PM - 3:30 PM**

**THE HUB EXPO is Open**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

**2:00 PM - 3:30 PM**

**THE HUB EXPO: Tailgate Party**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

Join us Sunday afternoon in THE HUB EXPO for our exciting Super Bowl Tailgate Party! Mingle with exhibitors, connect with your colleagues, and enjoy refreshments.

**2:15 PM - 3:15 PM**

**THE HUB STAGE: Souvenir Football Signing with Football Icon Doug Flutie**



*Location: THE HUB EXPO, Seaport Ballroom D-H*

Calling all football fans! Stop by THE HUB STAGE for an unforgettable experience with Heisman Trophy winner, NFL Quarterback, CFL Legend, and Philanthropist Doug Flutie. Get your place in line for a souvenir football signing and photo op with this sports icon. Sponsored by KeyBank Real Estate.

Speaker

**Doug Flutie**, *Heisman Trophy Winner, NFL Quarterback, CFL Legend, Philanthropist*

3:00 PM - 7:00 PM

**Opening Reception: Super Bowl Watch Party**

*Location: SEAPORT BALLROOM A-C*

Join your colleagues and other CREF25 attendees for the big game during the Opening Reception: Super Bowl Watch Party. Enjoy live music, delicious food, beverages, and plenty of networking opportunities between the action. You may even see Doug Flutie mingling with the crowd. Sponsored by KeyBank Real Estate.

3:00 PM - 3:45 PM

**FHA Closing Subcommittee (Open to MBA Members; Closed to Media)**

*Location: Harbor H*

## Monday, February 10, 2025

7:30 AM - 4:30 PM

**Registration**

*Location: Palm Foyer*

8:00 AM - 4:30 PM

**Headshot Caf  **

*Location: Seaport Ballroom Foyer*

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8:00 AM - 4:30 PM

**LinkedIn Profile Consultations**

*Location: Seaport Ballroom Foyer*

Sign up for a 15-minute LinkedIn Profile Consultation with an expert coach. Find out what your profile says about you and learn strategies to build and engage your network. Sponsored by Goldman Sachs. Sign up: <https://calendly.com/dwcs/mbacref25>



8:00 AM - 5:00 PM

**Press Room (Credentialed Media Only)**

*Location: Balboa A*

8:00 AM - 4:00 PM

**THE HUB EXPO is Open**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

8:00 AM - 9:00 AM

**Breakfast**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

Sponsored by PGIM Real Estate.

8:00 AM - 4:00 PM

**THE HOTSPOT**

*Location: THE HUB EXPO, SEAPORT BALLROOM D-H*

8:00 AM - 4:00 PM

**THE COFFEE SPOT**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

8:00 AM - 4:00 PM

**Bookstore**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

9:00 AM - 4:00 PM

**Capital Alley**

*Location: 4th Floor Pool Deck Cabanas*

Experience a brand-new networking space designed to help you forge meaningful connections and close deals. Step away from the lively buzz of the Hyatt lobby and head upstairs for one-on-one meetings with top lenders and capital providers ready to do business. Make plans to visit Capital Alley at MBA CREF25—where conversations transform into partnerships, and the deals you strike shape your future.

9:00 AM - 10:30 AM

**OPENING GENERAL SESSION: A Conversation with Andre Agassi**

*Location: Seaport Ballroom A-C*

Join us for a high-energy opening to CREF25. First, gain valuable industry updates and insight from MBA's President & CEO Bob Broeksmit and 2025 MBA Chair Laura Escobar. Then, be inspired by tennis legend Andre Agassi, whose success on and off the court has been chronicled in his best-selling autobiography, *Open*. During his 20-year tennis career, Agassi won 60 men's singles titles and was ranked World No.1 for 101 weeks. His leadership style — rooted in dedication, resilience, and authenticity—allowed him to successfully transition from elite athlete to philanthropist and savvy entrepreneur. After retiring from tennis, he pursued education reform through his foundation's charter schools and by launching a phonics-based learning platform. Expanding to real estate



development, Agassi started a lifestyle brand, then later partnered to create the Turner-Agassi Education Facilities Fund, which has opened 122 schools in economically challenged neighborhoods. Hear Agassi’s story and learn valuable lessons on adapting to change, overcoming adversity, and motivating others to strive to be their best, both in business and in life.

Speakers  
**Andre Agassi**, *Tennis Champion, Philanthropist, Education Advocate, and Author*  
**Robert D. Broeksmit**, *CMB, President & Chief Executive Officer, Mortgage Bankers Association*  
**Laura Escobar**, *2025 MBA Chair; President, Lennar Mortgage*  
**Jamie Woodwell**, *Senior Vice President of Commercial/Multifamily Policy and Strategic Industry Engagement, Mortgage Bankers Association*

10:30 AM - 11:00 AM

**Refreshment Break**  
*Location: THE HUB EXPO, Seaport Ballroom D-H*

10:30 AM - 11:15 AM

**THE HUB STAGE: Book Signing with Andre Agassi**  
*Location: THE HUB EXPO, Seaport Ballroom D-H*

Following a fascinating interview in the Opening General Session, meet Andre Agassi and have his book, "Open," signed to take home. Books available for purchase in THE HUB.

Speaker  
**Andre Agassi**, *Tennis Champion, Philanthropist, Education Advocate, and Author*

10:30 AM - 11:30 AM

**MBA Booth: Office Hours - CREF Policy and Advocacy Teams**  
*Location: THE HUB EXPO, Booth #405, Seaport Ballroom D-H*

MBA's new Vice President of Commercial/Multifamily Policy, Megan Booth, will be present to answer your questions, say hello, and talk about the future of our industry. Plus, learn how to support our industry by speaking with members of MBA’s Advocacy team.

11:00 AM - 12:00 PM

**GENERAL SESSION: MBA’s Economic and CREF Market Outlook**  
*Location: Seaport Ballroom A-C*

Join the industry’s best deep-dive into the economy and commercial and



multifamily real estate finance (CREF) markets– including the latest on originations, servicing, loan maturities, MBA’s forecast, and more. Sponsored by Lument.

Speakers

**Reggie Booker**, Associate Vice President, Commercial/Multifamily Research, Mortgage Bankers Association

**Mike Fratantoni, Ph.D.**, Chief Economist, Senior Vice President, Research and Business Development, Mortgage Bankers Association

**Tyler Griffin**, President of Mortgage Banking, Lument

12:00 PM - 1:15 PM

**FHA Issues Roundup (Open to MBA Members; Closed to Media)**

*Location: Harbor D-E*

12:00 PM - 1:00 PM

**Networking Lunch in THE HUB EXPO**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

12:30 PM - 1:15 PM

**THE HUB STAGE: Tech Showcase**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

Exhibitors bring their products to life in demos on THE HUB STAGE. Get your lunch from the buffet and watch these tech solutions for today’s marketplace. Demos presented include: North Shore CREF Operating System, Site Inspection Module; Egnyte's AI-Powered Document Workflow Solution; and the Banker AI Platform. See product details in the MBA Events app.

Speaker

**Dennis Carey**, Associate Director, Conference Programming, Mortgage Bankers Association

1:30 PM - 2:30 PM

**COMMERCIAL/MULTIFAMILY POLICY TRACK: Life After the Election: What MBA Is Monitoring 21 Days into the Trump Administration**

*Location: Harbor Ballroom B*

With a new administration in place, the Mortgage Bankers Association (MBA) and external political analysts are closely monitoring key policy shifts and their potential impact on the mortgage and real estate finance industry. Attend this session for an in-depth analysis of the top regulatory, legislative, and economic developments shaping the market, an update on policies to watch, and recommendations for addressing emerging challenges and opportunities.



Speakers

**Megan H. Booth**, *Vice President, CREF Policy, Mortgage Bankers Association*

**Bill Killmer**, *Senior Vice President, Legislative and Political Affairs, Mortgage Bankers Association*

**Ethan Saxon**, *Vice President of Legislative Affairs, Mortgage Bankers Association*

**Jeffrey A. Weidell**, *CMB, Chief Executive Officer, Northmarq*

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

1:30 PM - 2:30 PM

**INNOVATIVE OPERATIONS TRACK: Green Lending Compliance: Balancing Costs and Opportunities in a Sustainable World**

*Location: Harbor Ballroom C*

As sustainability takes center stage in the financial industry, green lending has become a niche area with unique opportunities and challenges. This session explores the complexities of green finance, including the involvement of some insurance companies now offering lending solutions, and the importance of compliance with evolving SEC regulations and ESG standards. The discussion covers the costs and reporting requirements for various property types, the nuances of green servicing, and the strategies needed to stay competitive. The session also highlights the role of FHA and the GSEs in promoting green lending, focusing on the pricing benefits offered for meeting specific sustainability criteria. Gain valuable insights into balancing financial and compliance challenges while leveraging green initiatives and incentives to create new avenues for growth.

Speakers

**Gary T. Amey**, *Managing Director, MAP Underwriting, Dwight Capital LLC*

**Kevin Fagan**, *Senior Director & Head of CRE Economic Analysis, Moody's Analytics CRE*

**Christopher Hoeffel**, *President, Counterpointe Sustainable Advisors LLC*

**Cory Jubran**, *Senior Director, Originations, Nuveen Real Estate*

1:30 PM - 2:30 PM

**MARKET OPPORTUNITIES TRACK: Navigating CRE Valuations, Asset Management, and Special Servicing Amid Market Stress and Rising Defaults**

*Location: Harbor Ballroom A*





As the commercial real estate (CRE) market faces increased pressure from rising defaults, the need for effective asset management and special servicing has never been more critical. Speakers explore the challenges and opportunities presented by the current market stress, including the impact of the looming maturity wave. Hear about the complexities of the valuation process, particularly in a volatile market where fluctuating interest rates, economic uncertainties, and sector-specific risks can significantly impact property values. Gain strategies for proactive asset management and specialized servicing approaches to handle distressed assets. Leave with insight into navigating these complexities and implementing effective practices to maximize value in today’s challenging market environment.

**Speakers**

**Brian L. Hanson**, *Managing Director, CWCapital Asset Management LLC*

**Anne Jablonski**, *Head of Commercial Real Estate, Exec. Managing Director, SitusAMC*

**Beau Jones**, *Executive Managing Director, Global Business Development, Trimont*

**Marc McDevitt**, *Director, Kroll Bond Rating Agency*

**Chris Robbins**, *Co-Founder & Managing Principal, GreenRock Capital, LLC*

**Matthew Rocco, Sr.**, *2023 MBA Chairman; President, Colliers Mortgage*

2:00 PM - 3:30 PM

**mPact Production Advisory Committee Meeting (By Invitation Only)**

*Location: Harbor F*

2:30 PM - 3:00 PM

**MBA Booth: Office Hours - Education Team**

*Location: THE HUB EXPO, Booth #405, Seaport Ballroom D-H*

Meet with members of MBA’s Education team to learn how you can advance your career this year.

2:30 PM - 3:00 PM

**Refreshment Break**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

2:30 PM - 3:00 PM

**THE HUB STAGE: Q&A with DEI Leadership Award Winners**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

Hear about the successful strategies that earned these companies' recognition as DEI Leadership Award-winners for their work internally and in the marketplace.



3:00 PM - 4:00 PM

Speaker

**Allyson Little**, *Director, Strategic Member Relations, Mortgage Bankers Association*

**COMMERCIAL/MULTIFAMILY POLICY TRACK: HUD and FHA Challenges in Multifamily**

*Location: Harbor Ballroom B*

Join HUD officials and industry experts for an in-depth exploration of the latest challenges and opportunities in HUD and FHA financing for the multifamily sector. This session will cover key issues affecting borrowers and lenders, including regulatory changes, processing timelines, and evolving requirements for HUD and FHA programs. Panelists will discuss strategies to navigate the complexities of these financing options, address common pitfalls, and provide insights into optimizing deal structures for multifamily and healthcare properties. Whether you're a lender, borrower, or service provider, this session offers essential knowledge to successfully manage HUD and FHA financing in today's market.

3:00 PM - 4:00 PM

Speakers

**Donald Billingsley**, *Associate Deputy Assistant Secretary, Multifamily Housing, Department of Housing & Urban Development*

**Mike Bisanz**, *Senior Vice President and Chief Operating Officer - FHA/HUD, Colliers Mortgage*

**Larry Flood**, *Acting Director, Office of Multifamily Production, U.S. Department of Housing and Urban Development*

**Jeffrey Little**, *General Deputy Assistant Secretary, FHA, U.S. Department of Housing and Urban Development*

**Karen Wipper**, *Executive Vice President, Chief Underwriter, Dwight Capital LLC*

**INNOVATIVE OPERATIONS TRACK: Property Insurance Brokerage: Essential Insights for Lenders, Closers, and Servicers**

*Location: Harbor Ballroom C*

Property insurance is a critical topic that continues to evolve, making it essential for lenders, closers, and servicers to stay informed. Recent natural disasters have significantly burdened the affordability and availability of property insurance, creating new challenges for the





industry. This session offers a fresh perspective on insurance, focusing on what lenders need to know to navigate the complexities of property insurance brokerage effectively. Experts will dive into key considerations, including coverage essentials, risk management strategies, and the latest trends that impact loan closings and servicing portfolios. Attendees gain valuable insights on how to approach insurance differently, manage risks, and adapt their strategies to this ever-relevant aspect of the real estate market.

Speakers

**Kathleen Dufraine**, *Managing Director, Insurance Operations Executive & Head of the Corporate Flood Program, JP Morgan Chase*

**Gretchan Francis**, *Managing Director, InsureMAC Financial Insurance Services*

**Frankie T. Jones**, *Vice President & Managing Director, Lincoln Financial Group*

**Jim King**, *Senior Director - Insurance, Q10 Capital, LLC*

**Fraser Roberts**, *Chief Executive Officer, INTECH Risk Management*

**Skylar Romines**, *Founder and Owner, ATW Advisors*

3:00 PM - 4:00 PM

**MARKET OPPORTUNITIES TRACK: Navigating Diverse Deal Structures to Adapt to Market Needs**

*Location: Harbor Ballroom A*

In a shifting commercial real estate (CRE) landscape, lenders and servicers must adapt to a wide array of deal structures and evolving market needs. Learn how various types of lenders, from traditional banks to alternative financing sources, are adjusting their strategies to meet borrower demands and manage risk. Additionally, hear how servicers are pivoting to support complex deals, including increased surveillance, handling transfers and assumptions, and navigating carve-outs. Speakers share the latest trends, challenges, and best practices for successfully managing loans from origination through servicing in today's dynamic market environment.

Speakers

**Jeff Davis**, *Senior Vice President and Director of Portfolio and Asset Management, Northmarq*

**Melissa A. Farrell**, *Managing Director, PGIM Real Estate*



**David A. Harrison**, *Chief Operating Officer, PNC Real Estate*  
**Stefanie Stewart**, *Senior Vice President, Voya Investment Management*  
**Derek Vander Veen, CCMS, CRIÂ®**, *Senior Vice President of Business Development, Grandbridge Real Estate Capital LLC*  
**CREF25 Capital Connections Networking Reception**  
*Location: 4th Floor Pool Deck, Manchester Grand Hyatt*

4:00 PM - 5:30 PM

We're excited to add an all-attendee networking reception to CREF25 designed to foster connections between capital providers and those seeking and facilitating financing for commercial real estate and multifamily properties. Set against a beautiful outdoor backdrop, this event promises to be an evening of networking, collaboration, and inspiration. Kick your night off and drop by to enjoy food, drinks, and entertainment while connecting with your industry peers and potential partners. Don't miss this chance to engage and celebrate the potential of our industry together! Sponsored by Bank of America, CBRE, JLL, Northmarq, Nuveen, and Mortgage Bankers Association.

5:30 PM - 6:30 PM

**MORPAC Leadership Reception (By Invitation Only)**

With a new administration in place, attendees will have the opportunity to hear from MBA leaders and senior-level staff on some of the top priorities for the CREF sector and all key capital sources that MBA will be engaged on with the incoming Trump administration – and discuss what Congress can do – or not do – to ensure a healthy real estate market.

## Tuesday, February 11, 2025

6:30 AM - 7:30 AM

**MBA Runs Sunrise 5K**

*Location: Seaport Tower Lobby, Kettner Blvd Entrance (near Market One)*

Up early? Join us for MBA Runs Sunrise 5K! Set against the stunning backdrop of San Diego's iconic Seaport Village, participants can connect with fellow industry professionals while making their way along the picturesque waterfront route. This event caters to all skill levels, whether you're a seasoned runner or casual walker. Join us bright and early for some fitness and fun in America's finest city! Meet up at 6:15 a.m.

7:30 AM - 5:00 PM

**Registration**

*Location: Palm Foyer*



8:00 AM - 8:45 AM

**LIHTC Subcommittee Meeting (Open to MBA Members; Closed to Media)**

*Location: Harbor H*

8:00 AM - 9:00 AM

**Servicer Executive Roundtable (By Invitation Only)**

*Location: Gaslamp AB*

8:00 AM - 5:00 PM

**Press Room (Credentialed Media Only)**

*Location: Balboa A*

8:00 AM - 3:00 PM

**Headshot Caf  **

*Location: Seaport Ballroom Foyer*

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8:00 AM - 3:00 PM

**LinkedIn Profile Consultations**

*Location: Seaport Ballroom Foyer*

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8:00 AM - 1:00 PM

**THE HUB EXPO is Open**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

8:00 AM - 9:00 AM

**Breakfast**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

Sponsored by Arbor.

8:00 AM - 2:00 PM

**THE HOTSPOT**

*Location: THE HUB EXPO, SEAPORT BALLROOM D-H*

8:00 AM - 1:00 PM

**THE COFFEE SPOT**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

8:00 AM - 1:00 PM

**Bookstore**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

9:00 AM - 4:00 PM

**Capital Alley**

*Location: 4th Floor Pool Deck Cabanas*

Experience a brand-new networking space designed to help you forge meaningful connections and close deals. Step away from the lively buzz



of the Hyatt lobby and head upstairs for one-on-one meetings with top lenders and capital providers ready to do business. Make plans to visit Capital Alley at MBA CREF25—where conversations transform into partnerships, and the deals you strike shape your future.

9:00 AM - 10:30 AM

**GENERAL SESSION: CRE Executive Perspectives**

*Location: Seaport Ballroom A-C*

The heads of major mortgage banking firms share their perspective on the market.

Speakers

**Christine Chandler**, 2025 MBA Chair-Elect; Executive Vice President, Chief Credit Officer & Chief Operating Officer, M&T Realty Capital Corporation

**Jeffrey T. Majewski**, Executive Managing Director, CBRE Capital Markets

**Hilary Branson Provinse**, Executive Vice President, Production and Capital Markets, Berkadia

**Wallace P. Reid**, Senior Managing Director, Capital Markets Debt Platform Leader, JLL Capital Markets

9:00 AM - 12:00 PM

**Open House with Representatives from FHA Western Region (Open to MBA Members; Closed to Media)**

*Location: Harbor F*

10:00 AM - 11:00 AM

**MBA Booth: Office Hours - Education Team (Future Leaders)**

*Location: THE HUB EXPO, Booth #405, Seaport Ballroom D-H*

Representatives from MBA's Education team will be at the MBA booth to answer your questions about the industry's premier leadership program.

10:30 AM - 11:00 AM

**Refreshment Break**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

10:30 AM - 11:30 AM

**Structured Finance Council Meeting (Open to Members; Closed to Media)**

10:30 AM - 11:00 AM

**THE HUB STAGE: Developing Next-Gen Talent**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

Learn about how MBA's CREF Careers and CREF Careers Student Fellowship Program can help you develop your next-gen talent.



11:00 AM - 12:00 PM

Speakers

**Reggie Booker**, Associate Vice President, Commercial/Multifamily Research, Mortgage Bankers Association

**Sofia Bressani**, Senior, Finance and Marketing, Florida State University

**Marques Carr**, Senior, Accounting and Finance, Morgan State University

**Lori-Lee Stennett**, Senior, Finance, Howard University

**mPower Event - The Leadership Edge: Mastering Body Language & Emotional Intelligence for Women in Power (Closed to Media)**

*Location: Seaport Ballroom A-C*

Join us for an insightful and entertaining networking event featuring Janine Driver, a New York Times bestselling author and international trainer who also has 17 years of experience in federal law enforcement. Janine introduces you to innovative, science-based communication strategies that elevate your leadership skills in negotiation, help you manage your emotions, and understand human behavior. Learn to master body language, harness your emotional intelligence, and stay ahead in negotiations—essential skills for driving results, building trust, and achieving long-term success. Don't miss this opportunity to become a leader who intuitively reads people, anticipates their moves, and confidently closes deals. The future of your business depends on it!

Sponsored by UBSRSVP by January 28:

<https://mbaforms.mba.org/mPowerCREF25>

12:00 PM - 1:00 PM

Speakers

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

**Janine Driver**, New York Times Bestselling Author and International Trainer

**Mary Wang**, Associate Director, Real Estate Finance, UBS

**MBA Advocacy Lunch & Learn (RSVP Required)**

With a new administration in place, attend an advocacy luncheon hosted by MBA's Political Programs. Learn what to expect during the tailored CREF Track at MBA's National Advocacy Conference (NAC), April 8-9 in Washington, D.C., and the vital role MBA advocacy plays in promoting and advancing your key industry issues like GSEs, taxes, and insurance with policymakers and elected officials. Hear from MBA leaders and staff on the potential impact on the mortgage and real estate finance





industry. To RSVP, fill out this form: <https://bit.ly/4fYSHm8> or contact Margie Ehrhardt at [mehrhardt@mba.org](mailto:mehrhardt@mba.org).

12:00 PM - 1:00 PM

**Networking Lunch in THE HUB EXPO**

*Location: THE HUB EXPO, Seaport Ballroom D-H*

12:30 PM - 1:00 PM

**MBA Booth: Office Hours - Education Team**

*Location: THE HUB EXPO, Booth #405, Seaport Ballroom D-H*

Meet with members of the MBA Education team to learn how you can advance your career this year.

1:00 PM - 2:00 PM

**COMMERCIAL/MULTIFAMILY POLICY TRACK: Housing Affordability in the US: Market Rate Versus Affordable - Where are the Opportunities?**

*Location: Harbor Ballroom B*

Explore the current state of housing affordability in the United States and the opportunities that exist in both market-rate and affordable housing sectors. This session examines key trends, policy impacts, and investment strategies for developers, investors, and lenders. Discover where the greatest potential lies for growth and how to navigate the challenges in this evolving market. Gain valuable insights into balancing risks and rewards while addressing the nation’s housing affordability challenges.

**Speakers**

- Rania Galan**, *Partner, Ballard Spahr LLP*
- Lopa Kolluri**, *Head of Affordable Housing Lending, M&T Bank Corporation*
- Tony Love**, *Senior Originator, BWE*
- Vince Toye**, *Head of Community Development Banking & Agency Lending, JP Morgan Chase*
- Daron Tubian**, *Head of Affordable Housing Investments, Barings*

1:00 PM - 2:00 PM

**INNOVATIVE OPERATIONS TRACK: Leveraging Technology and Generative AI for Deal Decision-Making in CRE Loan Origination and Servicing**

*Location: Harbor Ballroom C*

The rise of generative AI and advanced technology is transforming decision-making processes in commercial real estate (CRE) loan origination and servicing. This session will explore how AI-powered tools can streamline deal analysis, improve underwriting accuracy, and



enhance efficiency in loan servicing operations. Industry leaders will discuss the adoption of AI in the sector, as well as the challenges it brings, including information security, data protection, and reliability. Attendees will leave with practical strategies for integrating AI into their operations, addressing these challenges, and unlocking greater value in their deal-making processes.

Speakers

**Heather Anderson**, *Chief Technology Officer, Northmarq*  
**Charlotte Li**, *Banking & Credit Practice Lead, Egnyte, inc.*  
**Tina Lichens**, *General Manager, Capital Markets, LightBox*  
**L.D. Salmanson**, *Founder, Cherre*  
**Ben Schweitzer**, *Head of Innovation, Newmark*

1:00 PM - 2:00 PM

**MARKET OPPORTUNITIES TRACK: Location, Location, Location: Expert Insights on Industrial, Hospitality, Multifamily, Office, and Retail Markets**

*Location: Harbor Ballroom A*

Join leading researchers in commercial real estate (CRE) as they provide a deep dive into the latest market trends across key sectors, including industrial, hospitality, multifamily, office, and retail. Speakers present a comprehensive analysis of each segment, highlighting regional variations, emerging opportunities, and potential challenges in today's evolving landscape. Gain valuable insights into the factors shaping demand and investment trends, enabling more informed decisions. Whether you are looking to refine your strategy or explore new opportunities, this session is a must for those seeking to understand the forces driving the CRE market.

Speakers

**Patricia Bradshaw**, *Product Director, Trepp, Inc.*  
**Pharrah Jackson**, *Vice President, Greystone*  
**Joe Pella**, *Head of National Real Estate, Truist - Commercial Real Estate*  
**Stephanie Wiggins**, *Head of Production, Agency Lending, PGIM Real Estate*  
**Joanie Wilson**, *Senior Vice President, Chief Underwriter for Affordable and Bridge, M&T Realty Capital Corporation*

2:15 PM - 3:15 PM

**COMMERCIAL/MULTIFAMILY POLICY TRACK: Healthcare Lending:**



### **Opportunities and Challenges in Senior Living**

*Location: Harbor Ballroom B*

Explore the evolving landscape of healthcare lending for senior living facilities, including assisted living, skilled nursing, and independent living. This session will dive into current market trends and challenges such as staffing shortages, Medicare and Medicaid funding dynamics, and regulatory pressures. Gain insights into lending opportunities through FHA, GSE, and private financing programs, and discover how lenders can adapt to meet the growing needs of America's aging population. Ideal for industry professionals seeking to understand the complexities and opportunities in this critical sector.

#### Speakers

**Ritchie Dickey**, *Managing Director, White Oak Healthcare Finance*

**Tim Gruenes**, *Director, Asset Management & Lender Relations, U.S. Department of Housing and Urban Development*

**Doug Harper**, *Managing Director and Co-Manager Agency Finance Production, Lument*

**Alison J. Lemle**, *Chief Underwriter, VIUM Capital*

**JP LoMonaco**, *Executive Vice President, Valuation Advisory Services, CBRE*

**Roger M. Lukoff**, *Deputy Assistant Secretary, FHA Office of Healthcare Programs, U.S. Department of Housing and Urban Development*

2:15 PM - 3:15 PM

### **INNOVATIVE OPERATIONS TRACK: How Fraud is Influencing Deals: Navigating Risks in Today's Market**

*Location: Harbor Ballroom C*

Fraud has become critical in influencing business operations and decision-making in the commercial real estate market. This session will explore how fraudulent activities influence transactions, disrupt traditional deal structures, and impact business strategies. Industry experts will discuss fraud's effects on business operations, share red flags to watch for, and provide actionable strategies for minimizing risk. Attendees will better understand how fraud influences how businesses approach deals and learn to adapt their operations to this evolving threat landscape.

#### Speakers



2:15 PM - 3:15 PM

**Lindsey Bass**, *Senior Director- Fraud, AML & OFAC Compliance, Freddie Mac Multifamily*

**Leeza Duong**, *Managing Director, Wells Fargo Bank, N.A.*

**Adam Fox**, *Senior Director, Fitch Ratings*

**Amy Frazey, CPA**, *Assistant Vice President, Investment Administration, StanCorp Mortgage Investors, LLC*

**Cory Gabriel**, *Chief Technology Officer, BWE*

**MARKET OPPORTUNITIES TRACK: Building Smarter: Expert Insights from Construction Consultants on How and Where to Develop**

*Location: Harbor Ballroom A*

As the demand for new developments evolves, understanding where and how to build has become more crucial than ever. This session brings together leading construction consultants to dive into the nuts and bolts of construction, providing guidance on choosing prime locations, navigating zoning regulations, and optimizing construction strategies. Attendees learn about critical factors like contractor selection, labor costs, and how these vary across different regions and market sizes. The discussion includes a large market vs. small market cost analysis, highlighting regional differences that can significantly impact project budgets, along with considerations for adaptive reuse construction and its potential to reduce costs and environmental impact. Whether you're planning a new development or looking to refine your current projects, this session offers valuable insights to help you make informed construction decisions in today's competitive market.

Speakers

**Ernest Benjamin**, *Principal, BVRE Consulting & Advisory*

**Rob Hazelton**, *CEO, Dominion Due Diligence Group*

**Keith James**, *Developer, Inland Group*

**Patrick McNerney**, *President, Martin Building Company*

**Terry W. Wellman**, *Chief Underwriter, Berkadia*

**COMBOG Meeting (By Invitation Only)**

*Location: Harbor D-E*

3:30 PM - 5:30 PM

Wednesday, February 12, 2025

8:00 AM - 10:00 AM

**Registration**

*Location: Palm Foyer*

8:30 AM - 10:30 AM

**Breakfast and Closing Super Session**



*Location: Seaport Ballroom A*

Join your colleagues at the Closing Super Session for a round-up of the week's learning. It's been a busy week, and the ideas are flying! Bring your comments and questions and join an energetic and interactive discussion. Expert speakers from the program will be on hand. Casual attire at this session is welcome; come for as long or little as your schedule allows. Sponsored by Bank of America.

Speakers

**Stacy G. Ackermann**, *Partner, K&L Gates, LLP*

**Nick Brown**, *Director, Pacific Life Insurance Company*

**Victor Calanog, PhD, CRE, FRICS**, *Global Head of Research and Strategy, Manulife Real Estate Finance Group*

**Kevin Fagan**, *Senior Director & Head of CRE Economic Analysis, Moody's Analytics CRE*

**Drew Fung**, *Managing Director, Portfolio Manager, Clarion Partners*

**Beau Jones**, *Executive Managing Director, Global Business Development, Trimont*

**Jan Sternin, CMB**, *Senior Vice President, Managing Director, Berkadia*