

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

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Schedule and speakers subject to change.

# MBA's HUMAN RESOURCES SYMPOSIUM 2024



*10:30 – 10:45 AM*

## **Break**

*10:45 AM – 12 NOON*

## **Remote Work: Operational and Legal Perspectives**

- 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

*12 NOON – 1:00 PM*

## **Lunch**

*1:00 PM – 2:30 PM*

## **The Loan Originator Compensation and Other Regulatory and Legal Developments**

### **Speakers**

Justin Wiseman, Associate Vice President, Managing Regulatory Counsel, MBA (moderator)

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

- The State and Future of the CFPB
- LO Compensation rule and interpretations
- FDIC Guidance on Brokering
- Major employee-related lawsuits against lenders and what they could mean for the industry
- 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

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3:15 – 4:45 PM

## Discussion Breakout Sessions

- 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

6:00 PM – 7:30 PM

## Networking Reception

# AON

## 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

Schedule and speakers subject to change.

## MBA's HUMAN RESOURCES SYMPOSIUM 2024



- 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, 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

- 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

### **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

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12:00 NOON

**Adjourn**

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