

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.

MBA's HUMAN RESOURCES SYMPOSIUM 2024



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 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

Schedule and speakers subject to change.

MBA's HUMAN RESOURCES SYMPOSIUM 2024



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

- 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:

Schedule and speakers subject to change.

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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, Human Resources Director, 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

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

Schedule and speakers subject to change.

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- 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

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