

# Commercial/Multifamily Finance Convention and Expo

Saturday, February 10, 2024

8:00 AM - 4:30 PM

**Commercial / Multifamily Future Leaders Program**

*Location: 2nd Floor, Gaslamp*

5:00 PM - 6:30 PM

**Commercial / Multifamily Future Leaders Reception**

*Location: 2nd Floor, Balboa A-B*

Sunday, February 11, 2024

8:00 AM - 12:00 PM

**Commercial / Multifamily Future Leaders Program**

*Location: 2nd Floor, Gaslamp*

9:00 AM - 7:00 PM

**Registration**

*Location: 2nd Floor, Palm Foyer*

11:00 AM - 12:00 PM

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

*Location: 2nd Floor, La Jolla A*

12:00 PM - 5:00 PM

**Headshot Café**

*Location: 2nd Floor, Seaport Ballroom Foyer*

Stop by our professional photographer for a new headshot, complete with hair and makeup touchups. 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: 2nd Floor, 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 Lument. Link:

<https://calendly.com/dwcs/cref24>

1:00 PM - 2:00 PM

**Multifamily Council Meeting (Open to MBA Members; Closed to Media)**

*Location: 2nd Floor, Harbor Ballroom D*

2:00 PM - 3:30 PM

**Investment Committee Meeting (Committee Members Only)**

*Location: 2nd Floor, La Jolla A*

2:00 PM - 3:30 PM

**THE HUB EXPO Is Open: Tailgate Party**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

Come to THE HUB for our Super Bowl Tailgate Party. Visit with exhibitors, enjoy a beverage, and listen to an interview with former NFL wide receiver Vince Papale during Sports Talk on THE HUB STAGE. Save your questions for the Meet and Greet to follow!

2:15 PM - 3:15 PM

**THE HUB STAGE: Sports Talk with Vince Papale**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

Be inspired and entertained during this interview with an iconic sports figure, then enjoy the meet and greet that follows.

Speakers

**Mark Jones**, *2024 MBA Chairman; President, Union Home Mortgage*

**Vince Papale**, *Former Philadelphia Eagles Wide Receiver, Inspiration for the Movie Invincible*

3:00 PM - 7:00 PM

**Opening Reception: Super Bowl Watch Party**

*Location: 2nd Floor, Seaport Ballroom A*

Join your colleagues and other attendees for the big game during the Opening Reception: Super Bowl Watch Party. Enjoy music, food, beverages, and plenty of networking.

3:30 PM - 4:30 PM

**Meet & Greet and Souvenir Football Signing with Vince Papale**

*Location: 2nd Floor, Seaport Ballroom A*

Following Sports Talk, bring your questions and get a ball signed by special guest Vince Papale during the Super Bowl Watch Party at the Opening Reception.

Speaker

**Vince Papale**, *Former Philadelphia Eagles Wide Receiver, Inspiration for the Movie Invincible*

Monday, February 12, 2024

7:00 AM - 8:30 AM

**Life Mortgage and Real Estate Officers Council: Commercial Finance Council Breakfast Meeting (fka Dutch Treat)**

*Location: 2nd Floor, Harbor Ballroom G*

7:30 AM - 8:30 AM

**DUS® Chief Asset Managers Subcommittee Breakfast Meeting (By Invitation Only)**

*Location: 2nd Floor, Gaslamp A-B*

7:30 AM - 4:30 PM

**Registration**

*Location: 2nd Floor, Palm Foyer*

7:45 AM - 8:30 AM

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

*Location: 2nd Floor, Harbor Ballroom H*

8:00 AM - 9:00 AM

**Breakfast**

*Location: 2nd Floor, Seaport Ballroom Foyer*

8:00 AM - 4:30 PM

**Headshot Café**

*Location: 2nd Floor, Seaport Ballroom Foyer*

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8:00 AM - 4:30 PM

**LinkedIn Profile Consultations**

*Location: 2nd Floor, Seaport Ballroom Foyer*

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<https://calendly.com/dwcs/cref24>

8:00 AM - 5:00 PM

**Press Room (Credentialed Media Only)**

*Location: 2nd Floor, Balboa A*

8:30 AM - 10:00 AM

**OPENING GENERAL SESSION: What's Ahead in the Global Economy**

*Location: 2nd Floor, Seaport Ballroom A*

At a time when the Federal Reserve is struggling to bring down inflation without pushing the economy into a recession or a credit crunch, economic advisor Mohamed El-Erian brings a fresh perspective to the challenges that central bankers face, and the key trends that market participants should be watching. Knowing that policymakers are keenly interested in the state of commercial real estate markets, his comments also address how the CRE downturn is being perceived both here and abroad. The session opens with comments from MBA leadership. The winners of the Distinguished Service Award and Commercial/Multifamily Diversity Equity and Inclusion Awards will be announced during this session.

Speakers

**Robert D. Broeksmit, CMB**, *President & Chief Executive Officer, Mortgage Bankers Association*

**Mohamed A. El-Erian**, *President, Queens College, Cambridge; Chief Economic Advisor, Allianz; Former CEO and Co-Chief Investment Officer, PIMCO*

**Mike Fratantoni, PhD**, *Chief Economist and Senior Vice President of Research and Industry Technology, Mortgage Bankers Association*

**Mark Jones**, *2024 MBA Chairman; President, Union Home Mortgage*

10:00 AM - 4:30 PM

**Bookstore**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

Authors Lisa Sun & Mohamed El-Erian will be appearing at CREF24! The Library Shop will be on hand selling both books, while supplies last, but you can avoid the rush and save \$ by pre-ordering your books at this website: <https://www.libraryshopsd.org/cref24> Please select In-Store Pickup at checkout and we will bring your book to CREF24 and you can pick it up from us at the Library Shop's exhibitor booth starting MONDAY Feb. 12th. If you would like your book in advance of CREF24 you may pick it up from the Library Shop inside the Central Library. We will not be shipping any books pre-ordered until after CREF24 has concluded.

10:00 AM - 10:30 AM

**Refreshment Break**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*  
Sponsored by Citigroup Global Market Inc.

10:00 AM - 4:30 PM

**THE COFFEE SPOT**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

10:00 AM - 4:30 PM

**THE HUB EXPO is Open**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

10:00 AM - 10:30 AM

**THE HUB STAGE: Q&A with Mohamed El-Erian**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

10:30 AM - 11:00 AM

**GENERAL SESSION: Focus on Multifamily with Director Thompson**

*Location: 2nd Floor, Seaport Ballroom A*

Hear firsthand about the upcoming priorities of the Federal Housing Finance Agency (FHFA) for its policies and programs in the multifamily sector.

Speakers

**Mark Jones**, 2024 MBA Chairman; President, Union Home Mortgage

**The Honorable Sandra Thompson**, Director, Federal Housing Finance Agency (FHFA)

11:00 AM - 12:00 PM

**GENERAL SESSION: MBA's Economic and CREF Market Outlook**

*Location: 2nd Floor, Seaport Ballroom A*

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 Moody's.

Speakers

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

**Mike Fratantoni, PhD**, Chief Economist and Senior Vice President of Research and Industry

*Technology, Mortgage Bankers Association*

**Joe McBride**, *Head of Information Solutions, Moody's Analytics CRE*

**Jamie Woodwell**, *Vice President, Head of Commercial Real Estate Research, Mortgage Bankers Association*

12:00 PM - 1:30 PM

**Bank Senior Executive Lunch (By Invitation Only)**

*Location: 2nd Floor, Gaslamp C-D*

12:00 PM - 2:00 PM

**DUS® DEI Subcommittee Lunch Meeting (By Invitation Only)**

*Location: 2nd Floor, Gaslamp A-B*

12:00 PM - 1:15 PM

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

*Location: 2nd Floor, Harbor Ballroom D*

12:00 PM - 1:00 PM

**Lunch**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

12:15 PM - 1:00 PM

**THE HUB STAGE: Tech Showcase**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

12:15 Tech Demo 1 – Built Revolutionizing Deal Flow and Asset Management for CRE Lenders: Experience Built Technologies' innovative CRE platform in action, featuring proactive risk mitigation, data harvesting, and surveillance capabilities, empowering your deal/asset management team with unprecedented efficiency. 12:30 Tech Demo 2 – Lending Standard LendingStandard's SaaS platform specializes in the origination, underwriting, closing, and processing of all commercial real estate loan types. Our solution automates and streamlines much of the complex commercial lending process while ensuring compliance, providing pipeline insight, and driving efficiencies in your lending practice. 12:45 Tech Demo 3 – Advocate Technologies Advocate Technologies uses cutting-edge technology to provide insurance compliance services at both loan origination and servicing. Our platform allows teams to close compliance 50% faster and leverage insurance data insights to solve difficult borrower insurance situations.

Speaker

**Freddy Feliz**, *CIO & VP of Information Technology, Mortgage Bankers Association*

1:30 PM - 2:30 PM

**INNOVATIVE OPERATIONS TRACK: AI and the Next Generation of CRE Financing**

*Location: 2nd Floor, Harbor Ballroom A*

Technology and lending experts discuss how artificial intelligence (AI) is currently being used and can be best leveraged to drive efficiency, deal execution, and portfolio management.

Speakers

**Bryan Doyle**, *Managing Director, CBRE Capital Markets*

**Parag Goswami**, *CEO, Klik.ai*

**Dan Pallone, Jr.**, *Vice President, Mortgage REIT & Loan Solutions, SS&C Technologies, Inc.*

**Marc Rutzen**, *Co-Founder and Chief Executive Officer, HelloData.ai*

1:30 PM - 2:30 PM

**MARKET OPPORTUNITIES TRACK: The Future of the Office Sector**

*Location: 2nd Floor, Harbor Ballroom C*

Get a 360 view of the office asset class from experts in leasing, sales, lending, and asset management. Discuss leasing and sales velocity, the viability of class B and C properties and office conversions, asset surveillance, default trends, and the availability of equity.

Speakers

**Neal Casey**, *Executive Director, UBS*

**Jerry Dunn**, *President, Originations & Co-Founder, A10 Capital*

**Lonnie Hendry**, *Chief Product Officer, Trepp, Inc.*

**Zack Holderman**, *Senior Vice President, CBRE Capital Markets*

**Jaime Zadra**, *Managing Director, PGIM Real Estate*

1:30 PM - 2:30 PM

**POLICY PRIORITIES TRACK: FHA Lending in a Challenging Market**

*Location: 2nd Floor, Harbor Ballroom B*

Stay up to date and get the latest guidance on the Federal Housing Administration (FHA) multifamily lending programs. Learn about FHA's role as a counter-cyclical force for multifamily housing finance.

Speakers

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

**Leslie Duchene**, *Managing Director - FHA Chief Underwriter, M&T Realty Capital Corporation*

**Willie Fobbs, III**, *Director, Office of Multifamily Production, U.S. Department of Housing and Urban Development*

**Ethan D. Handelman**, *Deputy Assistant Secretary for Multifamily Housing, U.S. Department of Housing and Urban Development*

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

2:00 PM - 4:00 PM

**Presentation: StanCorp (By Invitation Only)**

*Location: 2nd Floor, Harbor Ballroom G*

2:45 PM - 3:45 PM

**INNOVATIVE OPERATIONS TRACK: Solutions for the Property Insurance Crisis**

*Location: 2nd Floor, Harbor Ballroom A*

Examine the root issues behind the current crisis in the affordability and availability of property insurance across the country. Get insurance experts' take on solutions to offset the issues plaguing the market, including alternatives like group funding, insurance modeling, and changes in risk tolerance.

Speakers

**Ashwin Agarwal**, *Chief Executive Officer & Co-Founder, Advocate Technologies*

**Emily Rasmussen**, *President and Chief Operating Officer, Resilience Insurance Analytics*

**Julie Serakos**, *Managing Director and Head of Model Product Management, Moody's RMS*

**Michael R. Smith**, *EVP, Specialty Lending, Alliant Insurance Services, Inc.*

2:45 PM - 3:45 PM

**MARKET OPPORTUNITIES TRACK: Using Data-Driven Insights to Solve the Affordability**



**Puzzle**

*Location: 2nd Floor, Harbor Ballroom C*

Learn to analyze available data to help unravel the complexities of housing affordability trends. Expert speakers offer strategies to manage portfolios and navigate the ever-changing real estate landscape. Don't miss this opportunity to stay ahead of the curve and enhance your expertise in serving borrowers in today's dynamic market.

Speakers

**Lu Chen**, *Director - Senior Economist, Moody's Analytics CRE*

**Pharrah Jackson**, *Vice President, Greystone*

**Tony Love**, *Senior Originator, BWE*

**Joanie Wilson**, *Senior Vice President, Chief Underwriter for Affordable and Bridge, M&T Realty Capital Corporation*

2:45 PM - 3:45 PM

**POLICY PRIORITIES TRACK: The Impact of Bank Regulation Changes**

*Location: 2nd Floor, Harbor Ballroom B*

Industry leaders explain the impacts of the fallout from the regional bank upheaval and the pending increases in bank capital requirements. You can find out how banks react through lending decisions and product offerings.

Speakers

**Wayne Brander**, *West Region Manager, US Bank Commercial Real Estate*

**LeLand Bunch**, *Managing Director, Bank of America*

**Christopher Marinac**, *Director of Research, Janney Montgomery Scott*

**Stephanie T. Milner**, *Associate Vice President, Head of Commercial and Multifamily Policy, Mortgage Bankers Association*

**Nipul Patel**, *Managing Director and Head of Real Estate Banking, Wells Fargo Bank, N.A.*

3:00 PM - 4:30 PM

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

*Location: 2nd Floor, Gaslamp C-D*

3:30 PM - 4:30 PM

**Networking Reception: Sunset Social**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

3:45 PM - 4:30 PM

**Fannie Mae All DUS® Lender Meeting (By Invitation Only)**

*Location: 4th Floor, Coronado Ballroom D-E*

4:30 PM - 6:00 PM

**Fannie Mae All DUS® Lender Reception (By Invitation Only)**

*Location: 4th Floor, Coronado Ballroom D-E Foyer*

4:30 PM - 6:00 PM

**Freddie Mac Multifamily Reception (By Invitation Only)**

*Location: 2nd Floor, Seaport Ballroom Foyer*

4:30 PM - 5:30 PM

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

*Location: Location will be provided upon RSVP*

This event will provide a unique opportunity to join other industry leaders committed to building and maintaining strong political relationships with elected officials as we seek to advance our commercial and multifamily legislative and regulatory priorities. In a small, intimate setting with MBA Leadership and MBA staff subject matter experts, we can discuss current marketplace realities and hold a dialogue regarding the policy and political outlook in Washington. Your engagement with policymakers on important industry issues is vital as we all work to navigate current market conditions and strengthen affordable rental housing and community development. To RSVP, visit: <https://rb.gy/n6ykrq>. You may also email MORPAC's Associate Director, Jamey Lynch at [jlynch@mba.org](mailto:jlynch@mba.org).

5:00 PM - 6:00 PM

**mPact Reception**

*Location: Harbor Tower, Lobby Level, Seaview Patio*

Tuesday, February 13, 2024

6:30 AM - 7:30 AM

**MBA Runs Sunrise 5K**

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

Be part of this conference's first-ever 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 at the Kettner Entrance near Market One to sign the waiver before heading out.

7:30 AM - 9:00 AM

**CRI Society Board Meeting (By Invitation Only)**

*Location: 2nd Floor, Gaslamp C*

7:30 AM - 8:45 AM

**DUS® Peer Group Breakfast Meeting (By Invitation Only)**

*Location: 2nd Floor, Harbor Ballroom G*

7:30 AM - 5:00 PM

**Registration**

*Location: 2nd Floor, Palm Foyer*

8:00 AM - 8:45 AM

**FHA Servicer Committee Meeting (Open to MBA Members; Closed to Media)**

*Location: 2nd Floor, Harbor Ballroom H*

8:00 AM - 5:00 PM

**Press Room (Credentialed Media Only)**

*Location: 2nd Floor, Balboa A*

8:30 AM - 9:30 AM

**Breakfast**

*Location: 2nd Floor, Seaport Ballroom Foyer*

8:30 AM - 3:00 PM

**Headshot Café**

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**LinkedIn Profile Consultations**

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about you and learn strategies to build and engage your network. Sponsored by Lument. Link:  
<https://calendly.com/dwcs/cref24>

9:00 AM - 9:45 AM

**General Session: An Update from FHA**

*Location: 2nd Floor, Seaport Ballroom A*

Sponsored by Berkadia.

Speakers

**Robert D. Broeksmit, CMB**, *President & Chief Executive Officer, Mortgage Bankers Association*

**Julia Gordon**, *FHA Commissioner, U.S. Department of Housing and Urban Development*

**Emily Schultz**, *Senior Vice President, Head of Fannie Mae Originations, Berkadia*

9:30 AM - 2:00 PM

**Bookstore**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

Authors Lisa Sun & Mohamed El-Erian will be appearing at CREF24! The Library Shop will be on hand selling both books, while supplies last, but you can avoid the rush and save \$ by pre-ordering your books at this website: <https://www.libraryshopsd.org/cref24> Please select In-Store Pickup at checkout and we will bring your book to CREF24 and you can pick it up from us at the Library Shop's exhibitor booth starting MONDAY Feb. 12th. If you would like your book in advance of CREF24 you may pick it up from the Library Shop inside the Central Library. We will not be shipping any books pre-ordered until after CREF24 has concluded.

9:30 AM - 2:00 PM

**THE COFFEE SPOT**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

9:30 AM - 2:00 PM

**THE HUB EXPO is Open**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

9:45 AM - 10:30 AM

**GENERAL SESSION: Doing Business with the GSEs**

*Location: 2nd Floor, Seaport Ballroom A*

Speakers

**Christine Chandler**, 2024 MBA Vice-Chair; Executive Vice President, Chief Credit Officer & Chief Operating Officer, M&T Realty Capital Corporation

**Michele Evans**, Executive Vice President and Head of Multifamily, Fannie Mae Multifamily

**Kevin Palmer**, Senior Vice President and Head of Multifamily, Freddie Mac

10:00 AM - 10:30 AM

**THE HUB STAGE: Tech Showcase**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

10:00 Tech Demo 4 – North Shore Systems (CREF Operating System™) North Shore System’s total solution for construction loan analysis, origination, and administration ... powered by its world-class LOS/Asset Management cloud system ... and accessible to all via its Portal and NS Mobile app. 10:15 Tech Demo 5 – SS&C SS&C Technologies is transforming lending operations by leveraging robotic process automation (RPA) to reduce the cost of originating/servicing a loan and improve the customer experience. Join us as we showcase how we’re delivering cost and time savings with our flagship Precision LM and Blue Prism solutions.

Speaker

**Freddy Feliz**, CIO & VP of Information Technology, Mortgage Bankers Association

10:30 AM - 12:00 PM

**Affordable Rental Housing Advisory Council Meeting (By Invitation Only)**

*Location: 2nd Floor, Harbor Ballroom D*

10:30 AM - 11:00 AM

**Refreshment Break**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

10:30 AM - 11:00 AM

**THE HUB STAGE: CREF Careers Info Session**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

Learn about how MBA’s CREF Careers and CREF Fellowship program can help you develop your next-gen talent.

Speaker

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

11:00 AM - 12:00 PM

**INNOVATIVE OPERATIONS TRACK: Top Servicing Issues for Originators**

*Location: 2nd Floor, Harbor Ballroom A*

Take a crash course in the latest servicing issues you need to know to best advise your clients through the life of the loan. Increased surveillance, trends in transfers, assumptions and carve-outs, insurance challenges, and other hot topics are discussed.

Speakers

**Joe DeRoy, Jr.**, *SVP, CMBS Program Leader, KeyBank Real Estate Capital, KeyCorp*

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

**David A. Harrison**, *Chief Operating Officer, PNC Real Estate*

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

**Crystal N. Kalinowski, CCMS**, *Managing Director, District Capital LLC*

11:00 AM - 12:00 PM

**MARKET OPPORTUNITIES TRACK: Construction and Adaptive Reuse Lending**

*Location: 2nd Floor, Harbor Ballroom C*

Private Lenders are filling a significant void in today's market for construction and adaptive reuse loans as banks continue to tighten lending standards. A panel of private construction lenders discuss the types of projects being targeted by private lenders, the loan terms being offered, and the rapid rise of CPACE loans as part of the construction capital stack.

Speakers

**Gary Bechtel**, *Chief Executive Officer, Red Oak Capital Holdings, LLC*

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

**Dana Jo Martino, CCMS**, *Senior Vice President, Managing Director, Servicing, Berkadia*

**Chris Robbins**, *Managing Principal, GreenRock Capital, LLC*

11:00 AM - 12:00 PM

**POLICY PRIORITIES TRACK: Healthcare Property Challenges**

*Location: 2nd Floor, Harbor Ballroom B*

Learn about the latest market trends in the senior living and healthcare markets. Topics will include Navigating Staffing, Reimbursements, Insurance, and Financing.

Speakers

**Timothy P. Gruenes**, *Director of Asset Management and Lender Relations, Office of Residential Care F, U.S. Department of Housing and Urban Development*

**Tina Laurie**, *Chief Underwriter, PGIM Real Estate*

**Tom Lettieri**, *Vice President, Valuation Information Group, CBRE Capital Markets*

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

**Jenifer Williams**, *Chief Underwriter- Healthcare, Berkadia*

11:15 AM - 12:00 PM

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

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

MBA's Allyson Little interviews DEI Award winners about their successful strategies.

Speaker

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

12:00 PM - 1:00 PM

**Lunch**

*Location: THE HUB EXPO, 2nd Floor, Seaport Ballroom D*

12:00 PM - 1:30 PM

**mPower Lunch: Catalyzing Confidence with Lisa Sun**

*Location: 2nd Floor, Seaport Ballroom A*

Noted fashion entrepreneur, best-selling author, and former McKinsey & Company consultant Lisa Sun breaks everything we have previously known about confidence. Through proprietary research and stories, Sun has cracked the code to help women build self-worth on their own terms. By sharing the eight strengths that every woman can call upon to be successful, she inspires us to harness our superpowers and use gravitas

to advance personally and professionally. Join us for this networking lunch hosted by mPower founder, Marcia Davies. Sponsored by CBRE. RSVP: <https://mbaforms.mba.org/CREF24mPowerRSVP>

Speakers

**Marcia M. Davies**, *mPower Founder and Chief Operating Officer, Mortgage Bankers Association*

**Sarah E. Garland**, *Senior Managing Director, Production for Affordable Housing, CBRE Capital Markets*

**Lisa Sun**, *Founder and CEO, GRAVITAS, National Best-Selling Author*

1:30 PM - 2:30 PM

**Book Signing with Lisa Sun**

*Location: 2nd Floor, Seaport Ballroom Foyer*

Author Lisa Sun will be appearing at CREF24! The Library Shop will be on hand selling both books, while supplies last, but you can avoid the rush and save \$ by pre-ordering your books at this website:

<https://www.libraryshopsd.org/cref24> Please select In-Store Pickup at checkout and we will bring your book to CREF24 and you can pick it up from us at the Library Shop's exhibitor booth starting MONDAY Feb. 12th. If you would like your book in advance of CREF24 you may pick it up from the Library Shop inside the Central Library. We will not be shipping any books pre-ordered until after CREF24 has concluded.

1:30 PM - 2:30 PM

**INNOVATIVE OPERATIONS TRACK: Adding Angel/Preferred Equity and Mezzanine Debt to the Capital Stack (Closed to Media)**

*Location: 2nd Floor, Harbor Ballroom A*

Mortgage bankers gain an understanding of angel equity, preferred equity and mezzanine debt. Get advice on the documentation and approvals needed. Learn what to look for when assessing this type of financing.

Speakers

**Catherine Chen**, *Managing Director, Apollo Global Management*

**Ridge Chew**, *Executive Director, Morgan Stanley*

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

**Joel Heikenfeld**, *Managing Director, Debt & Equity, Northmarq*

**Greg Michaud**, *Managing Director & Head of Real Estate Finance, Voya Investment Management*



1:30 PM - 2:30 PM

**MARKET OPPORTUNITIES TRACK: Deep Dive on Asset Classes and Capital Sources**

*Location: 2nd Floor, Harbor Ballroom C*

Spend an hour focusing on the state of the industry by asset class. Look for unseen opportunities, like medical use of office space, retail growth potential, and hotel trends. Identify favored asset classes from the investor viewpoint and hear where each capital source is lending.

Speakers

**Kevin Adatto**, *Managing Director, Investment Sales, Northmarq*

**Stefanos Arethas**, *Managing Director and Head of Commercial Real Estate, ATLAS SP Partners*

**Roy Chun**, *Senior Managing Director and Head of the CMBS Surveillance Group, Kroll Bond Rating Agency*

**Stephen Johnson**, *SVP - MF Production & Sales, Freddie Mac Multifamily*

**Stefanie Stewart**, *SVP, Voya Investment Management*

1:30 PM - 2:30 PM

**POLICY PRIORITIES TRACK: Loan Modifications and Workouts in an Increasing Rate Environment**

*Location: 2nd Floor, Harbor Ballroom B*

Learn about commercial loan modifications and workouts in an increasing rate environment where there is demand for equity for investors and borrowers. Consider differences in CMBS, Debt Funds, Life Companies, Banks, and agency lending.

Speakers

**Adam Behlman**, *President, Real Estate Investing, Servicing and Starwood Mortgage Capital, Starwood Property Trust*

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

**Robert R. Maddox**, *CMB, AMP, Partner, Bradley*

**Roy E. Miller**, *Senior Director - Multifamily Special Asset Mgmt, Fannie Mae Multifamily*

**Jerry Smith**, *Principal & President, Citrine Advisors*

3:00 PM - 5:30 PM

**COMBOG Meeting (By Invitation Only)**

*Location: 2nd Floor, Harbor Ballroom D*

3:15 PM - 4:00 PM

**DUS® Chief Underwriters Meeting (By Invitation Only)**

*Location: 4th Floor, Coronado Ballroom E*

4:00 PM - 5:30 PM

**DUS® Chief Underwriters Reception (By Invitation Only)**

*Location: 4th Floor, Coronado Ballroom D-E Foyer*

5:30 PM - 6:30 PM

**COMBOG & Future Leaders Alumni Reception (By Invitation Only)**

*Location: 2nd Floor, Harbor Ballroom Foyer*

Wednesday, February 14, 2024

8:00 AM - 10:00 AM

**Registration**

*Location: 2nd Floor, Harbor Ballroom Foyer*

8:30 AM - 10:30 AM

**Breakfast and Closing Super Session**

*Location: 2nd Floor, Harbor Ballroom A*

Join your colleagues at the 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 welcome; come for as long or little as your schedule allows. Sponsored by Bank of America

Speakers

**Maggie Burke**, *Senior Vice President, Capital One Commercial Real Estate*

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

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