

# National Advocacy Conference

Monday, March 18, 2024

8:00 AM - 5:00 PM

**Residential Future Leaders Meeting**

*Location: Burnham, Constitution Level*

1:00 PM - 3:30 PM

**RESBOG Meeting (Committee Members Only)**

*Location: Constitution Ballroom A, Constitution Level*

4:00 PM - 5:00 PM

**Advocacy Leaders Meet & Greet (By Invitation Only)**

Members of the MORPAC and MAA Steering Committees, including MAA State Captains will join State Leaders to kick off MBA's 2024 National Advocacy Conference (NAC).

5:00 PM - 7:30 PM

**MORPAC Reception and Dinner (By Invitation Only)**

MORPAC's annual fundraising reception and dinner, exclusively available to top MORPAC supporters. A special thanks to our event sponsors: Black, Mann, & Graham LLP, EPM, and Mphasis Digital Risk.

Tuesday, March 19, 2024

7:30 AM - 6:30 PM

**Registration**

*Location: 3B Registration Desk*

8:00 AM - 11:00 AM

**Residential Future Leaders Program**

*Location: Burnham, Constitution Level*

8:15 AM - 10:15 AM

**CMB Society Meeting (CMB Designees Only)**

*Location: Wilson/Roosevelt/Cabin John/Arlington - Constitution Level*

9:00 AM - 10:15 AM

**mPact Capitol Hill Overview and Networking Breakfast (Closed to Media)**

*Location: Latrobe, Constitution Level*

Kick off the first day of the conference at mPact's Capitol Hill Overview and Networking Breakfast for a unique opportunity to engage with Hill staffer(s) and learn how to prepare for effective advocacy within your own organization. Come prepared with questions for the experts and pack extra business cards for plenty of networking.

10:30 AM - 11:00 AM

**OPENING GENERAL SESSION: Welcome and A Look at the Political Landscape**

*Location: Constitution Ballroom AB, Constitution Level*

Get an update on the lay of the land in Washington and what to expect during the conference. This session sets the foundation for the meetings ahead. MBA's CEO Bob Broeksmit will also present the prestigious Burton C. Wood Legislative Service Award to an MBA member. Sponsored by Longbridge Financial.

Speakers

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

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

**Chris Mayer, CEO, Longbridge Financial**

11:00 AM - 11:30 AM

**GENERAL SESSION: Remarks from Representative Guy Reschenthaler (R-PA) (Closed to Media)**

*Location: Constitution Ballroom AB, Constitution Level*

Hear from Congressman Guy Reschenthaler (R-PA) in his leadership role as the Republican Chief Deputy Whip as he gives both political and policy updates for the remainder of the 118th Congress.

Speakers

**Melanie Coulton, CMB, AMP, Regional Vice President, Plaza Home Mortgage, Inc.**

**Rachel Kelley, Vice President of Legislative Affairs, Mortgage Bankers Association**

**Representative Guy Reschenthaler (R-PA), U.S. House of Representatives**

11:30 AM - 12:00 PM

**GENERAL SESSION: Economic Outlook and Market Landscape**

*Location: Constitution Ballroom AB, Constitution Level*

Get an economic overview of the residential and commercial/multifamily market from MBA's Chief Economist and Senior Vice President of Research and Industry Technology, Mike Fratantoni, Ph.D.

Speaker

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

12:00 PM - 1:30 PM

**Lunch Featuring Guest Speaker: Charlie Cook**

*Location: Constitution Ballroom AB, Constitution Level*

Don't miss American political analyst, specializing in election forecasts and political trends, Charlie Cook's update and outlook of the 2024 presidential election matchups, public opinions on the field, and fascinating analysis and prognostication. Sponsored by Winnow Solutions, LLC.

Speakers

**Charlie Cook**, *Columnist, Founder The Cook Political Report*

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

**Wendy Lovett**, *National Sales Manager, Winnow Solutions, LLC*

1:30 PM - 2:00 PM

**GENERAL SESSION: Regulatory Update (Closed to Media)**

*Location: Constitution Ballroom AB, Constitution Level*

Get a regulatory overview of the residential and commercial/multifamily issue updates from Housing and Urban Development Secretary Marcia Fudge's Chief of Staff.

Speakers

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

**Julienne Joseph**, *Chief of Staff, U.S. Department of Housing and Urban Development*

2:00 PM - 3:15 PM

**GENERAL SESSION: Residential & Commercial/Multifamily (CMF) Policy Briefing and Legislative Update (Closed to Media)**

*Location: Constitution Ballroom AB, Constitution Level*

Get the information you need to make an impact on the legislation, people and processes that affect the single-family and commercial/multifamily real estate finance industry. MBA Staff experts provide the latest information on key primary issues including the state of the mortgage/real estate market in your district/state; eliminating trigger lead abuses while preserving their use in appropriately limited circumstances; supporting legislation to establish a standalone partial claim option for VA Home Loan borrowers facing financial hardship; advancing programs that reduce barriers to homeownership/supporting housing affordability for continued economic recovery; urging Congress to contact the Federal Reserve, Federal Deposit Insurance Corporation (FDIC), and the Office of the Comptroller of the Currency (OCC) (“the Banking Agencies”) about their collective Notice of Proposed Rulemaking (NPR) to update capital requirements for banks with assets of \$100 billion or more (aka the “BASEL III endgame”); and, maintaining FHA as an efficient source of financing to increase supply of available multifamily rental housing and residential healthcare facilities.

Speakers

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

**Matt Jones**, *Associate Vice President of Government Housing Finance, Mortgage Bankers Association*

**Rachel Kelley**, *Vice President of Legislative Affairs, Mortgage Bankers Association*

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

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

**Fran Mordi**, *AMP, Vice President, Financial Management, Tax and Accounting Policy, Mortgage Bankers Association*

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

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

**Justin Wiseman**, *Vice President, Managing Regulatory Counsel, Mortgage Bankers Association*

3:00 PM - 5:30 PM

**Hill Meeting Information Help Desk**

*Location: 3B Registration Desk Foyer*

Pick up Hill meeting materials and review your schedule for visits. MBA Staff and vendor, Soapbox, will be on hand to answer questions and make changes.

3:15 PM - 3:30 PM

**Refreshment Break**

*Location: Constitution Ballroom Foyer, Constitution Level*

3:30 PM - 4:00 PM

**GENERAL SESSION: Lobbying Details, Dos and Don'ts (Closed to Media)**

*Location: Constitution Ballroom AB, Constitution Level*

During this general session State Leaders will receive final schedules and meeting materials for Hill meetings on Wednesday, March 20. MBA Staff will walk you through best practices for meeting with your elected officials and senior staff.

Speakers

**Luke Gilner**, *Senior Account Manager, Soapbox Consulting, LLP*

**Jamey Lynch**, *AMP, Associate Vice President of Political Affairs, Mortgage Bankers Association*

4:00 PM - 4:30 PM

**GENERAL SESSION: Remarks from Senator Katie Boyd Britt (R-AL) (Closed to Media)**

*Location: Constitution Ballroom AB, Constitution Level*

Hear from Alabama Senator Katie Britt, a member of the Senate Banking, Housing, and Urban Development, Appropriations, and Rules Committees, and get a live update on Capitol Hill. Britt is the first woman elected to U.S. Senate from Alabama and the youngest Republican woman ever elected to the Senate.

Speakers

**Jake Belter**, *CMB, AMP, Senior Director of Strategic Sales, MMI*

**Senator Katie Boyd Britt (R-AL)**, *U.S. Senate*

4:30 PM - 5:00 PM

**GENERAL SESSION: State Delegation Time (Closed to Media)**

*Location: Constitution Ballroom AB, Constitution Level*

Ask questions on issues and logistics and make any changes to your Hill schedules. Meet with your state

colleagues to discuss logistics and strategy.

5:00 PM - 5:30 PM

**GENERAL SESSION: Remarks from Representative Brittany Pettersen (D-CO) (Closed to Media)**

*Location: Constitution Ballroom AB, Constitution Level*

Hear from Congresswoman Brittany Pettersen (D-CO), a key member of the House Financial Services Committee, which holds congressional jurisdiction for all housing and mortgage-related policy issues.

Speakers

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

**Representative Brittany Pettersen (D-CO)**, *U.S. House of Representatives*

**Madisyn Rhone**, *Vice President of Legislative Affairs, Mortgage Bankers Association*

5:30 PM - 6:30 PM

**MBA Advocacy Mixer with Remarks from Senator Jack Reed (D-RI) (Closed to Media)**

*Location: Constitution Ballroom CDE, Constitution Level*

Mix it up at this networking and advocacy reception where you will meet other like-minded advocates, enjoy light refreshments, and learn more about the importance of your involvement. And hear about critical housing finance legislation with Rhode Island Senator Jack Reed, a senior member of the Senate Banking, Housing, and Urban Development Committee and Chairman of the Senate Armed Services Committee. Sponsored by Success Mortgage Partners.

Speakers

**Owen V. Lee**, *Chief Executive Officer, Success Mortgage Partners, Inc.*

**Benjamin Pettit**, *VP, Corporate and Legal Affairs, Equity National Title*

**Senator Jack Reed (D-RI)**, *U.S. Senate*

7:00 PM - 9:00 PM

**CONGRESSIONAL RECEPTION: National Museum of Women in the Arts (Closed to Media)**

*Location: 1250 New York Ave., NW, Washington DC*

Join MBA's experienced lobbyists, elected officials, industry experts, and fellow practitioners for this unique opportunity to convene at the National Museum of Women in the Arts, an institution that advocates for better

representation of women artists and a vital center for thought leadership, community engagement, and social change. This historic D.C. attraction has just reopened after a major renovation. Be among the first to experience the transformation of this Washington landmark, and the bold and important exhibitions that celebrate women in the arts.

Wednesday, March 20, 2024

7:00 AM - 9:00 AM

**Hill Meeting Information Help Desk**

*Location: 3B Registration Desk Foyer*

State Leaders pick up Capitol Hill meeting leave behinds

7:00 AM - 9:00 AM

**Registration**

*Location: 3B Registration Desk*

7:00 AM - 8:00 AM

**State Delegation Breakfast Meeting (Closed to Media)**

*Location: Constitution Ballroom AB, Constitution Level*

8:00 AM - 9:00 AM

**GENERAL SESSION: Remarks from Representative Bill Huizenga (R-MI) and Capitol Hill Sendoff (Closed to Media)**

*Location: Constitution Ballroom AB, Constitution Level*

Arrive early to get your seat and be energized for the day ahead. MBA Leadership shares perspective on top priorities for the industry moving forward and provides words of inspiration and encouragement as we leave to advocate on Capitol Hill.

Speakers

**Representative Bill Huizenga (R-MI), U.S. House of Representatives**

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

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

9:00 AM - 4:00 PM

**MBA Hospitality Hub**

*Location: MBA Townhouse, 503 2nd Street, NE, Washington DC*

MBA's townhouse will be open all-day Wednesday, March 20 to serve as a hospitality hub from 9 AM until 4PM. Stop by to rest between meetings, store luggage or grab a quick snack. MBA Townhouse is located on the Senate side of the Capitol complex.

9:00 AM - 4:00 PM

### **Residential Track - Capitol Hill Visits**

Attendees who've signed up to lobby on residential policy issues will follow their individualized schedules.

9:30 AM - 3:00 PM

### **CREF Track Meetings and Hospitality Hub (See individual sessions for more details)**

Morning Location (9:30 AM – 12:00 PM): U.S. Capitol, Capitol Visitors Center, Room 208 First Street SE Washington, DC 20515 Afternoon Location (12:00 PM – 3:00 PM): National Association of Realtors (NAR) 500 New Jersey Avenue, NW Top Floor Washington, D.C. 20001-2020 Note: Constituent Hill meetings will be ongoing during the day. If you opted in, please see your personalized state delegation schedule for those meetings. Sponsored by BWE and Northmarq.

9:30 AM - 12:00 PM

### **CREF Track Session 1: Priorities of the 118th Congress**

*Location: U.S. Capitol, Capitol Visitors Center, First Street SE, Room 208*

MBA Vice-Chair, Christine Chandler facilitates updates from numerous members of Congress on priorities for the remainder of the 118th Congress. Don't miss this opportunity to pose your questions. Sponsored by BWE and Northmarq. 9:30 AM - 9:45 - Remarks from Representative Mike Carey (R-OH) \*Meeting with the Ohio state delegation immediately following; 9:45 AM – 10:00 AM - Remarks from Representative Claudia Tenney (R-NY); 10:00 AM – 10:30 AM - Remarks from Representative Jimmy Gomez (D-CA); 10:30 AM – 11:00 AM - Remarks from Senator Sherrod Brown (D-OH)'s Congressional Office – Jeremy Hekhuis, Deputy Chief of Staff/General Counsel; 11:30 AM – 12:00 PM - Remarks from Representative Jimmy Panetta (D-CA)

Speaker

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

12:00 PM - 12:45 PM

### **CREF Track Lunch**

*Location: National Association of Realtors, 500 New Jersey Avenue, NW, Top Floor*



Take a short walk to get lunch at our afternoon meeting location at the National Association of Realtors, 500 New Jersey Avenue, NW. Sponsored by BWE and Northmarq.

12:45 PM - 1:30 PM

**CREF Track Session 2: Discussion with the American Property Casualty Insurance Association**

*Location: National Association of Realtors, 500 New Jersey Avenue, NW, Top Floor*

Hear from COMBOG Chair Jeff Weidell, CMB. He is followed by a property casualty insurance expert who discusses drivers behind increased cost and availability of property insurance in the C/MF market, creative short-term solutions, the long-term outlook, how MBA members can advocate for changes and the role that federal, state and local governments play in the long-term solutions. Sponsored by BWE and Northmarq.

Speakers

**Gary Sullivan**, *Senior Director, Emerging Risks, American Property Casualty Insurance Association*

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

1:30 PM - 2:00 PM

**CREF Track Session 3: Fireside chat with Federal Deposit Insurance Corporation (FDIC)**

*Location: National Association of Realtors, 500 New Jersey Avenue, NW, Top Floor*

Federal Deposit Insurance Corporation (FDIC)'s mission is to maintain stability and public confidence in the nation's financial system. The FDIC insures deposits, examines and supervises financial institutions for safety and soundness and consumer protection, works to make large and complex financial institutions resolvable, and manages receiverships. Hear from a member of the FDIC's Board of Directors on the Basel III bank capital proposal, impact of CRE market on banking sector and more issues. Sponsored by BWE and Northmarq.

Speakers

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

**Jonathan McKernan**, *Member of the Board of Directors, Federal Deposit Insurance Corporation*

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

2:00 PM - 2:30 PM

**CREF Track Session 4: Roundtable with FHFA Official**

*Location: National Association of Realtors, 500 New Jersey Avenue, NW, Top Floor*

The Federal Housing Finance Agency serves as the regulator and conservator of Fannie Mae and Freddie

Mac (the government-sponsored enterprises, or GSEs), as well as the regulator of the Federal Home Loan Bank (FHLB) system. For over a decade, MBA has been the thought leader for industry and policy stakeholders alike with respect to reforming the GSEs and navigating their conservatorships. FHFA will provide an update on their Multifamily Housing goals for 2024 and hear directly from participants how the industry is meeting lending needs after the recent bank failures. Sponsored by BWE and Northmarq.

Speakers

**Siobhan Kelly**, *Associate Director for Multifamily Analytics and Policy, OMAP, Federal Housing Finance Agency (FHFA)*

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

2:30 PM - 3:00 PM

**CREF Track Session 5: Market Update and Closing Remarks**

*Location: National Association of Realtors, 500 New Jersey Avenue, NW, Top Floor*

This session provides an in-depth market update from MBA's own Vice President of CRE Research, Jamie Woodwell. Closing remarks are delivered by MBA's Vice President of CREF Policy, Stephanie Milner; and, Associate Vice President, Multi-Family, Megan Booth. Sponsored by BWE and Northmarq.

Speakers

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

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

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

4:00 PM - 6:00 PM

**Capitol Hill Debrief and Reception**

*Location: MBA Townhouse, 503 2nd Street, NE, Washington, DC*

Stop by the MBA Townhouse for a drink to debrief the day with your colleagues. Sponsored by Alston & Bird.