

**MBA's STATE &
LOCAL WORKSHOP**
JW MARRIOTT WASHINGTON DC



APRIL 17-18

State and Local Workshop

Monday, April 17, 2023

7:30 AM - 5:30 PM	Registration <i>Location: Grand Ballroom Foyer</i>
8:00 AM - 8:30 AM	Continental Breakfast <i>Location: Grand Ballroom Foyer</i>
8:30 AM - 9:00 AM	Opening Session: Remarks from MBA Leadership <i>Location: Grand Ballroom Salon IV</i> MBA's President & CEO Bob Broeksmit, CMB, shares the industry state of play and highlights key MBA initiatives and takes questions from the audience. Speakers Dana Abernathy, CMB, AMP , Senior Vice President, Enterprise Sales, Computershare Loan Services Robert D. Broeksmit, CMB , President & Chief Executive Officer, Mortgage Bankers Association Pete Mills, SVP , Residential Policy and Strategic Industry Engagement, Mortgage Bankers Association
9:00 AM - 10:15 AM	Introductions and Key Workshop Takeaways <i>Location: Grand Ballroom Salon IV</i> Get to know your fellow attendees. MBA's lead liaison with state and local associations, William Kooper, outlines the workshop objectives and invites everyone to introduce themselves. Attendees will be asked to ID their key workshop takeaways Speakers William Kooper, MPA , Vice President of State Governmental Affairs and Industry Relations, Mortgage Bankers Association Anthony Siller, Sr. Specialist , State & Local Association Engagement, Mortgage Bankers Association
10:15 AM - 10:30 AM	Refreshment Break

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	<p><i>Location: Grand Ballroom Foyer</i></p> <p>General Session: Amplify Your Association's Impact <i>Location: Grand Ballroom Salon IV</i></p>
10:30 AM - 12:00 PM	<p>Motivational speaker Steve Richman will discuss best-practices utilized to drive engagement in the post-COVID market. Learn how to entice younger mortgage professionals to get involved, increase membership by combining factions, and effectively partner with groups outside the mortgage industry. Get tips to take your events to the next level, including how to identify topics and speakers who attract larger audiences; and how to host valuable events beyond lunches, happy hours and golf tournaments.</p> <p>Speaker Steve Richman, <i>Business Strategist and Industry Influencer</i></p>
12:00 PM - 1:15 PM	<p>Networking Lunch <i>Location: Grand Ballroom Salon IV</i></p>
1:15 PM - 1:30 PM	<p>Mini Session: State Legal and Regulatory Compliance - Tools for Your Members</p> <p>Do your members need easy access to multiple state statutes and regulations? Attend this session to hear about, Winnow, a sophisticated and powerful new tool you can use to help your members' meet their vital compliance needs while building your association's value proposition.</p> <p>Speaker Chris Hilliard, <i>Chief Operating Officer and Founder, Winnow Solutions, LLC</i></p>
1:30 PM - 2:30 PM	<p>General Session: Enhancing Member Engagement with Innovative Event Programming</p> <p>Learn how to provide a consistent level of benefit to your association's key stakeholders. Leaders of the Colorado Mortgage Lenders Association and the California Mortgage Bankers Association discuss their successful Executive Forum event format.</p>

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	<p>Speakers Deb Meogrossi, <i>Chairwoman, Board of Governors, Colorado Mortgage Lenders Association; Owner, Mortgage Forums, LLC</i> Susan Milazzo, <i>Chief Executive Officer, California Mortgage Bankers Association</i></p>
<p>2:45 PM - 3:45 PM</p>	<p>General Session: Creating Affordable Housing Opportunities - Lessons for State and Local Associations <i>Location: Grand Ballroom Salon IV</i></p> <p>State and local associations are on the front lines of exploring solutions for our nation's affordable housing challenges. A wide variety of national and state stakeholders are working together to develop programs and resources to help buyers who are seeking affordable housing options. This session will feature seasoned experts in a wide-ranging discussion of lessons learned and potential tactics and strategies attendees can use to help their organizations expand access to affordable homeownership opportunities.</p> <p>Speakers Simone Griffin, <i>Vice President, Affiliate Relations, HomeFree USA</i> Michael Innis-Thompson, <i>SVP, Community Lending & Development, TD Bank</i> Mia Jones, AMP, <i>Affordable Lending Manager, Freddie Mac</i> Wendy Penn, <i>AVP, Affordable Housing, Mortgage Bankers Association</i></p>
<p>3:45 PM - 4:00 PM</p>	<p>Refreshment Break <i>Location: Grand Ballroom Foyer</i></p>
<p>4:00 PM - 5:30 PM</p>	<p>Coffee Talk Super Session <i>Location: Grand Ballroom Salon IV</i></p> <p>Always a workshop favorite, this facilitated discussion is your time to explore challenges, exchange ideas and share best practices with your peers.</p> <p>Speakers</p>

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MORTGAGE BANKERS ASSOCIATION

MBA's STATE & LOCAL WORKSHOP

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APRIL 17-18

Danielle Becker, *Executive Director, Maryland Mortgage Bankers and Brokers Association, Inc.*
Anthony Siller, *Sr. Specialist, State & Local Association Engagement, Mortgage Bankers Association*
Robin Weyrens, *Executive Director, Mortgage Bankers Association of the Carolinas, Inc.*

5:30 PM - 6:30 PM

Networking Reception
Location: Penn Avenue Terrace

Tuesday, April 18, 2023

8:00 AM - 8:30 AM

Continental Breakfast
Location: Grand Ballroom Foyer

8:30 AM - 9:00 AM

General Session: Mortgage Banking Bound Case Study with the MBA of Florida
Location: Grand Ballroom Salon IV

Are your members struggling to develop new talent? MBA's extensive education catalog can propel the next generation of mortgage bankers. In conjunction with MBA Education, the MBA of Florida's Mortgage Banking Bound program is a learning and development success story. Learn how your association can leverage opportunities like this and offer effective training to your members.

Speakers
Peter Grace, AMP, *Senior Vice President of Strategy and Member Services, Mortgage Bankers Association*
Bob Niemi, CMB, *Director of Government Affairs and CMB Society Secretary, Weiner Brodsky Kider PC*

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APRIL 17-18

9:00 AM - 10:15 AM

General Session: Tips for Successfully Engaging Your State Regulator

Location: Grand Ballroom Salon IV

This session will feature former state regulators and current state association leaders in a dynamic discussion of how to best represent your members before your state's mortgage supervisory body. Attend this session to learn more about the best strategies for policy engagement with regulatory staff, as well as the basics of regulatory policy making in the states.

Speakers

Amy Greenwood-Field, *Partner, McGlinchey Stafford*

Debbie J. Sousa, *Executive Director, Massachusetts Mortgage Bankers Association, Inc.*

Stacey L. Valerio, Esq., *Attorney, Ballard Spahr LLP*

Keisha Whitehall Wolfe, *Counsel, Orrick*

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