

# Commercial/Multifamily Finance Servicing and Technology Conference

Sunday, May 19, 2024

3:00 PM - 4:00 PM

## **CRE Legal Council Meeting (Open to MBA Members; Closed to Media)**

*Location: Studio 4, 2nd Floor*

All MBA member attendees are welcome to join us for a constructive forum to discuss current legal issues impacting CMF real estate, including topics related to loan origination, securitization, servicing, litigation/risk mitigation, and the regulatory landscape. Best suited for attorneys, general counsel, paralegals and document governance functions.

3:00 PM - 4:00 PM

## **Life Insurance Company Executive Roundtable (Open to MBA Members; Closed to Media)**

*Location: Mardi Gras Ballroom Salon D, 3rd Floor*

If you are a servicing executive for a life insurance company with a current MBA membership, join your peers to discuss topics related to the servicing and asset management of life company general account loans and assets.

3:00 PM - 4:00 PM

## **mPact Servicing Advisory Committee Meeting (Open to MBA Members; Closed to Media)**

*Location: Mardi Gras Ballroom Salon E, 3rd Floor*

3:00 PM - 6:00 PM

## **Registration**

*Location: Ballroom Foyer, 3rd Floor*

4:00 PM - 5:00 PM

## **CCMS Designee Society Meeting (Society Members Only; Closed to Media)**

*Location: Studios 2-3, 2nd Floor*

The Commercial Certified Mortgage Servicer (CCMS) Designee society is for all graduates of the CCMS program. We encourage all designees to attend the society meeting to discuss leadership opportunities, philanthropic initiatives, and emerging issues for today's servicing and asset management professionals.

4:30 PM - 5:30 PM

## **mPact Servicing Reception (Open to MBA Members; Closed to Media)**

*Location: St. Charles, 41st Floor*

mPact is MBA's network for young professionals in the real estate finance industry. Kick off your conference experience by connecting with your peers. Open to all attendees who are MBA members.

5:00 PM - 6:00 PM

**CCMS Society Reception (Open to MBA Members; Closed to Media)**

*Location: Studio 6, 2nd Floor*

Interested in knowing more about the Certified Commercial Mortgage Servicer designation? Drop by to mingle with designees and leaders active in this respected program. Open to all attendees who are MBA members.

Monday, May 20, 2024

7:30 AM - 5:30 PM

**Registration**

*Location: Ballroom Foyer, 3rd Floor*

8:00 AM - 8:30 AM

**Continental Breakfast in the Exhibit Area**

*Location: Acadia, 3rd Floor*

Start your day with coffee and a continental breakfast, sponsored by Althans Insurance Inc.

8:00 AM - 5:30 PM

**Exhibit Area Open**

*Location: Acadia, 3rd Floor*

8:00 AM - 5:00 PM

**Membership Engagement Zone**

*Location: Ballroom Foyer, 3rd Floor*

8:30 AM - 9:45 AM

**OPENING GENERAL SESSION: Market Outlook**

*Location: Carondelet, 3rd Floor*

After opening remarks on the commercial/multifamily real estate finance landscape from MBA's 2024 Vice-Chair, Christine Chandler, Hear from MBA's Research and Economics team as they discuss the latest on the economy and the CRE marketplace, with a special focus on issues of importance to commercial mortgage servicers. This session provides a forecast you can't afford to miss, and helps you understand where the markets are and where they are heading. This session also celebrates the newest recipients of the Commercial Certified Mortgage Servicer (CCMS) designation. Sponsored by PNC Real Estate

Speakers

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

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

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

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

9:45 AM - 10:00 AM

**Refreshment Break in the Exhibit Area**

*Location: Acadia, 3rd Floor*

Join us for a cold beverage and a snack, sponsored by HUB Financial Services

10:00 AM - 10:50 AM

**GENERAL SESSION: Servicing in the Current Market**

*Location: Carondelet, 3rd Floor*

Join MBA Vice-Chair, Christine Chandler, along with a panel of industry professionals, as they dive into the complex dynamics of rate fluctuations, maturities, and various other critical market conditions. Through insightful discussions. Attend this session to gain valuable insights into the factors shaping today's financial landscape and discover strategies to navigate through evolving market trends with confidence and expertise. Sponsored by Colliers Mortgage

Speakers

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

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

**Brian L. Hanson**, *Managing Director, CWC Capital Asset Management LLC*

**Carina Johnson**, *Senior Vice President, Walker & Dunlop, LLC*

**Ben Larson**, *Vice President - Asset Management, Colliers Mortgage*

**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*

11:00 AM - 12:00 PM

**BREAKOUT SESSION: Best Practices in Insurance Exception Request**

*Location: Mardi Gras Ballroom Salon E, 3rd Floor*

Lenders continue to increase their scrutiny on insurance waiver requests, leaving servicers to manage the borrower's expectations. This session walks through a complex waiver case study from beginning to end, including the use of risk modeling.

Speakers

**Reed Austin Besselman**, *Assistant Escrow Manager, CBRE Loan Services, Inc.*

**Kathleen Dufraigne**, *Managing Director, Insurance Operations Executive & Head of the Corporate Flood Program, JP Morgan Chase*

**Misty Leeth**, *Managing Director - Insurance and Loan Servicing, Newmark*

**Whitney Ronning**, *Vice President, Director of Insurance, Northmarq*

**Laura J. Smith**, *Senior Managing Director, Resilience Insurance Analytics*

11:00 AM - 12:00 PM

**BREAKOUT SESSION: Challenges of Property Conditions & Inspections**

*Location: Mardi Gras Ballroom Salon D, 3rd Floor*

Inconsistencies around maintenance and inspection requirements make servicing loans difficult. Hear a panel of experts discuss ideas on how to adhere to the new requirements to ensure property health and safety standards are met.

Speakers

**Annabelle Agyeman**, *Vice President, Asset Management, Grandbridge Real Estate Capital LLC*

**Jonelle Faal**, *Senior Vice President, Asset Management & Credit Analytics, SitusAMC*

**Megan McConville**, *Director - CMS Asset Management, Principal Real Estate*

**Charles Scott, CCMS**, *Vice President, Asset Management, PGIM Real Estate*

11:00 AM - 12:00 PM

**BREAKOUT SESSION: Managing Increasing Compliance Requirements**

*Location: Mardi Gras Ballroom Salon F-H, 3rd Floor*

Monitoring and managing compliance requirements at the loan and servicing contract level while tracking numerous covenants and triggers can get complicated. Inproper management can leave the servicer exposed to audit findings or penalties. Join this panel for best practices in managing all the moving pieces to ensure the servicer stays compliant.

Speakers

**Stacy G. Ackermann**, *Partner, K&L Gates, LLP*

**Michael Bruggman**, *Executive Director - Head of FHA Asset Management, Wells Fargo Bank, N.A.*

**Sally Ingberg**, *Senior Vice President & Director, Asset Management Agency, BWE*

**Victoria Kratzberg**, *Vice President, Operations Manager Senior, PNC Real Estate*

**Christina Legree Morrison**, *Vice President & Director of Asset Management (CAM), CPC Mortgage Company*

11:00 AM - 12:00 PM

**Loan Closers Committee Meeting (Open to MBA Members; Closed to Media)**

*Location: Studio 2, 2nd Floor*

12:00 PM - 1:00 PM

**Networking Lunch in the Exhibit Area**

*Location: Acadia, 3rd Floor*

Join us for a sampling of New Orleans cuisine at today's lunch, sponsored by RealInsight.

1:00 PM - 2:00 PM

**BREAKOUT SESSION: Loan Servicing Reimagined - Technology, Process, and Connectivity**

*Location: Mardi Gras Ballroom Salon E, 3rd Floor*

This session offers a forward-looking perspective on modernizing loan servicing and asset management operations. The panelists will explore the intersection of technology, process, data granularity, and connectivity, highlighting their critical role in reimagining loan servicing efficiency and compliance.

Speakers

**Sharena Daniel**, *JLL/T Product Management, JLL Capital Markets*

**James Flake**, *Senior Vice President, Head of Multifamily Asset Management, Capital One Commercial Real Estate*

**Justin Lincoln**, *Senior Loan Portfolio Analyst, Ameritas Investment Partners*

**Daniel Linder**, *Managing Director, Head of Revenue, RealINSIGHT*

**Richard Marion**, *CCMS, Senior Vice President, M&T Realty Capital Corporation*

1:00 PM - 2:00 PM

**BREAKOUT SESSION: The Effects and Challenges to DSCR**

*Location: Mardi Gras Ballroom Salon D, 3rd Floor*

Join the conversation discussing the effects of valuations and borrower financial challenges driving the Debt Service Coverage Ratio below thresholds and learn servicers' best practices.

Speakers

**James Gaffney**, *Senior Managing Director - Head of Servicing & Asset Management, Newmark*

**Brian Pounds**, *Vice President - Senior Manager of Portfolio & Asset Management, Northmarq*

**Leslie Schultze**, *Senior Director, JLL Capital Markets*

**Molly Skipper Steele**, *Head of Strategic Growth, Apprise by Walker & Dunlop*

**Michael A. Tilden**, *Senior Manager, CMBS Portfolio Services, KeyBank Real Estate Capital, KeyCorp*

1:00 PM - 2:30 PM

**FHA Servicers Roundtable (Open to MBA Members; Closed to Media)**

*Location: Bonaparte, 4th Floor*

Please join us with for a discussion with staff from HUD's Office of Multifamily as well as the Office of Residential Care Facilities. Topics will include NSPIRE inspections, 10-year PCNAs, Subordinate liens at assignment, Servicing Handbook, Risk Surveillance Dashboard, and Completion of Repairs. There will also be ample time for open Q&A.

1:00 PM - 2:00 PM

**Small Servicers Committee Meeting (Open to MBA Members; Closed to Media)**

*Location: Studio 2, 2nd Floor*

Open to all servicing shops with 25 or fewer people or who service \$10 Billion or less. Join peers to discuss small servicer challenges.

2:15 PM - 4:15 PM

**Explore the CCMS Designation: Lending and Real Estate Markets - Test Your Knowledge with Four Case Studies**

*Location: Studio 3, 2nd Floor*

Designed to complement CCMS exam preparation, this session covers determining the appropriate loan amount for four property types. Join us for a dynamic learning experience that promises to enhance your understanding of lending practices and real estate market dynamics. Duration: 2 hours.

2:15 PM - 3:15 PM

**GENERAL SESSION: Cybersecurity - The Bad Guys Are Looking for Opportunities**

*Location: Carondelet, 3rd Floor*

The FBI Director recently warned Congress that hackers are preparing to wreak havoc on critical components of US infrastructure. These risks are real, and recent attacks in real estate finance have debilitating impacts on companies. Attend this session to learn specific actions you and your company can take to be best prepared to protect your company.

Speakers

**Brett E. Adams**, *Senior Vice President & Managing Director, Servicing, Berkadia*

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

**Beverly Henshaw**, *CISSP, CCSP, PMP, Cybersecurity Advisor, Department of Homeland Security*

**Michael Nougier**, *Chief Information Security Officer, Richey May*

3:15 PM - 3:30 PM

**Refreshment Break in the Exhibit Area**

*Location: Acadia, 3rd Floor*

Stop by for a sweet or savory treat, sponsored by HUB Financial Services

3:30 PM - 4:30 PM

**BREAKOUT SESSION: Brace Yourselves - Impact of Increased Loan Defaults and Decreased Valuations**

*Location: Mardi Gras Ballroom Salon E, 3rd Floor*

Rumors of a downturn have circulated for the last two years. Join servicers and special servicers as they discuss best practices to prepare for declining appraisal values and defaulting loans.

Speakers

**Dale Becker**, *Director, FHA/USDA Asset Management - Agency Risk, Lument*

**Mike Jenkins**, *Senior Vice President, KeyBank Real Estate Capital, KeyCorp*

**Chuck Ryba**, *CCMS, SMD and Head of Asset Management, NewPoint Real Estate Capital*

**Katie Schwarting**, *Firmwide Board Member, Seyfarth Shaw LLP*

3:30 PM - 4:30 PM

**BREAKOUT SESSION: Investor Reporting Best Practices**

*Location: Mardi Gras Ballroom Salon F-H, 3rd Floor*

Complex loans require in-depth investor reporting. Join investor reporting experts as they discuss the evolution of reporting needs to meet investor requirements and the benefit of improved interdepartmental communication and technology.

Speakers

**Audrey Brann**, *Vice President, Servicing, Walker & Dunlop, LLC*

**Nicole Denis**, *Investor Accounting Manager, JLL Capital Markets*

**Melanie Follstaedt**, *Investor Accounting Manager, Colliers Mortgage*

**Tatyana Serikova**, *Managing Director, Business Analytics, Wells Fargo Bank, N.A.*

3:30 PM - 4:30 PM

**BREAKOUT SESSION: Transforming Servicing Operations - Leveraging AI & IA**

*Location: Mardi Gras Ballroom Salon D, 3rd Floor*

Artificial intelligence (AI) and intelligent automation (IA) are common themes that are increasingly emerging in servicing discussions; however, it can be difficult to define those terms, understand how they are applicable to servicing, and conceptualize how to practically and sustainably implement into operations. Hear from a panel of experts to understand the basics of intelligent automation, and today's use cases.

Speakers

**Megan Czechowski**, *Senior Vice President, Head of Apprise, Apprise by Walker & Dunlop*

**Laura Krashakova**, *Chief Executive Officer, Smart Capital*

**Jen Lindell**, *Director - Servicing Business Transformation, Northmarq*

**Bob Wright**, **CMB, CCMS**, *Managing Director, Precision LM, SS&C Technologies, Inc.*

3:30 PM - 4:30 PM

**Operations Committee Meeting (Open to Members; Closed to Media)**

*Location: Studio 2, 2nd Floor*

Join us as we discuss hot topics, gain insights from guest speakers, and exchange ideas regarding commercial real estate servicing. Servicing professionals involved in all facets of servicing operations are welcome to attend this meeting.

4:30 PM - 5:30 PM

**Opening Reception in the Exhibit Area - French Quarter Fete**

*Location: Acadia, 3rd Floor*

Join your peers for a little French Quarter Fete as we kick off the conference experience with some New Orleans favorites.

5:30 PM - 6:30 PM

**Servicing Senior Executive Reception (Invitation Only)**

*Location: Studio 9, 2nd Floor*

Tuesday, May 21, 2024

7:30 AM - 5:30 PM

**Registration**

*Location: Ballroom Foyer, 3rd Floor*

8:00 AM - 8:30 AM

**Continental Breakfast in the Exhibit Area**

*Location: Acadia, 3rd Floor*

Start your day with coffee and a continental breakfast, sponsored by Bellwether Enterprise Real Estate Capital, LLC.

8:00 AM - 9:30 AM

**DUS Chief Asset Managers Subcommittee (By Invitation Only)**

*Location: Studio 9, 2nd Floor*

8:00 AM - 3:30 PM

**Exhibit Area Open**

*Location: Acadia, 3rd Floor*

8:00 AM - 5:00 PM

**Membership Engagement Zone**

*Location: Ballroom Foyer, 3rd Floor*

8:30 AM - 9:30 AM

**GENERAL SESSION: Discussion with the American Property Casualty Insurance Association**

*Location: Carondelet, 3rd Floor*

Join this session to hear from property casualty insurance expert Gary Sullivan, 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 companies can advocate for changes and the role that federal, state and local governments play in the long-term solutions.

Speakers

**Michael Flood, Jr.**, *Senior Vice President of Commercial/Multifamily Policy and Member Engagement, Mortgage Bankers Association*

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

9:30 AM - 9:45 AM

**Refreshment Break in the Exhibit Area**

*Location: Acadia, 3rd Floor*

Enjoy a cold beverage and some trail mix to add fuel to the morning breakouts. Sponsored by CoreLogic.

9:45 AM - 10:45 AM

**Asset Management Committee Meeting (Open to MBA Members; Closed to Media)**

*Location: Studio 2, 2nd Floor*

MBA members specializing in asset management, capital improvements, covenant tracking, property inspections, property management, rent rolls, or tenant relationships are invited to join us for networking with peers and hear insights from industry experts.

9:45 AM - 10:45 AM

**BREAKOUT SESSION: Evolution of Insurance Compliance Reviews and Technology**

*Location: Mardi Gras Ballroom Salon D, 3rd Floor*

Join us for an insightful exploration into the dynamic landscape of insurance compliance reviews and the transformative role of technology in shaping its evolution. In this session, examine the challenges, innovations, and opportunities driving the industry forward.

Speakers

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

**Laura Bushey**, *Vice President, Insurance, Berkadia*

**Jennifer Clements**, *Senior Risk Manager, MF Risk Management, Insurance, Fannie Mae Multifamily*

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

**Paul Wooldridge**, *MF Asset Mgmt Dir, Freddie Mac Multifamily*

9:45 AM - 9:45 AM

**BREAKOUT SESSION: Exploring the Interconnections of Title, Survey, and Zoning**

*Location: Mardi Gras Ballroom Salon F-H, 3rd Floor*

Get valuable insights into the critical role of surveys, zoning compliance, zoning letters and reports, and title companies. Join this session to learn strategies in navigating surveys, zoning letter requirements, and title companies.

Speakers

**Maxwell Gerwin**, *Attorney, Dinsmore & Shohl LLP*

**Jeannette Harry**, *Manager, SMI Operations, StanCorp Mortgage Investors, LLC*

**Luke Hoffman**, *CCMS, Manager - Head of CML Closing & Servicing, TruStage*

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

**Melanie Lewis**, *Vice President, Closing Manager, BWE*

9:45 AM - 10:45 AM

**BREAKOUT SESSION: Show Me the Money - Effective Processes for Cash Managed Loans**

*Location: Mardi Gras Ballroom Salon E, 3rd Floor*

This session explore the four points of cash management, including forecasting, mobilizing and managing the

cash flow, maintaining bank relations, and investing surplus cash in today's market.

Speakers

**Bernie Avondet**, *Senior Vice President & Director, Servicing Operations, BWE*

**Larney Bisbano**, *Director, CRE Servicing & Asset Management, SitusAMC*

**Marcy Burns**, *Director of Treasury Management Real Estate, PNC Real Estate*

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

**Anne Seehusen**, *Vice President, Senior Manager of Portfolio and Asset Management, Northmarq*

9:45 AM - 11:45 AM

**Explore the CCMS Designation: Take a CCMS Designation Mock Exam**

*Location: Studio 3, 2nd Floor*

Join us for a comprehensive mock test combined with an engaging discussion focused on the four exam topic areas: Servicing Operations, Asset Management, Servicing Company Valuation, and Legal & Regulatory. This interactive session features live polling, allowing participants to actively participate and test their knowledge. The mock test consists of 20 questions, with five questions from each topic area. Prepare for the exam while enhancing your understanding of key concepts. Duration: 2 hours.

11:00 AM - 12:00 PM

**GENERAL SESSION: Top Origination Issues for Servicers**

*Location: Carondelet, 3rd Floor*

Join your peers for a comprehensive crash course designed to equip you with the latest insights into origination issues critical for effectively servicing your borrowers throughout the loan lifecycle. Explore essential topics such as cash management structures, renewing rate caps, and a wealth of other pertinent subjects essential for success in today's dynamic lending landscape.

Speakers

**Kristie Alvelo**, *Senior Vice President, Servicing Special Requests, Berkadia*

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

**Mike Morey**, *Vice President & Managing Director, StanCorp Mortgage Investors, LLC*

**Michael S. Tanner**, *President, Pacific Southwest Realty Services*

**Heather Wright**, *Partner, Bradley*

12:00 PM - 1:00 PM

**Book Signing with Christine Beckwith**

Line up to meet the author and get your signed copy of "Clear Boundaries - Every Business Woman Essential Safety Guide", while supplies last.

12:00 PM - 1:30 PM

**DUS Operations Subcommittee (By Invitation Only)**

*Location: Studio 9, 2nd Floor*

12:00 PM - 1:30 PM

**Insurance & Risk Management Committee Meeting (Open to MBA Members; Closed to Media)**

*Location: Bissonet, 3rd Floor*

MBA members with a focus on insurance coverage assets and risk management are encouraged to join this meeting. Receive updates on the committee's work while enjoying lunch.

12:00 PM - 1:00 PM

**Networking Lunch in the Exhibit Area**

*Location: Acadia, 3rd Floor*

1:00 PM - 2:00 PM

**BREAKOUT SESSION: Closing Catastrophes - War Stories and Workarounds**

*Location: Mardi Gras Ballroom Salon F-H, 3rd Floor*

Join this session to discuss the challenges and nuisances of commercial real estate loan closing. Hear from closing professionals as they present use cases of actual closing scenarios and the innovative workarounds and practical strategies employed for mitigating and overcoming these challenges.

Speakers

**Adam Chaudhary**, *President, FundingShield LLC*

**Mary Funderburk**, *Vice President, Sr. Closer, Colliers Mortgage*

**Rania Galan**, *Partner, Ballard Spahr LLP*

**Arren Goldman, Esq.**, *Partner, Seyfarth Shaw LLP*

**Velinda Maxwell**, *Vice President, Walker & Dunlop, LLC*

1:00 PM - 2:00 PM

**BREAKOUT SESSION: Garbage In - Garbage Out: Data Integrity and Business Solutions**

*Location: Mardi Gras Ballroom Salon D, 3rd Floor*

The complexity of loan requirements demands increased controls for data integrity while new business solutions tease the ease of data mobility, monitoring, and storage. Join the robust conversation as experts debate the need for new business solutions supporting data and technology standardization.

Speakers

**Kristi Dowdle**, *Senior Director, Servicing, Lument*

**Michael Heagerty**, *CCMS, CFO - Principal, Gantry*

**Denise F. Ross**, *Chief Operating Officer, McCracken Financial Solutions Corp.*

**Lyle C. Shapland**, *Senior Vice President, PNC Real Estate*

**Steven Smith**, *Chief Executive Officer, Basecap Analytics*

1:00 PM - 2:00 PM

**BREAKOUT SESSION: Digging “Deeper than a Hollar” into Loan Modifications & Special Servicing**

*Location: Mardi Gras Ballroom Salon E, 3rd Floor*

Given the current market conditions, what is in the special servicer playbook? Join a panel of experts as they walk through case studies and real-life examples.

Speakers

**Elizabeth E. Burnett**, *CCMS, Managing Director, Loan Servicing, Slatt Capital*

**Saadia Ghazi**, *Partner, Seyfarth Shaw LLP*

**David W. Haley**, *Senior Managing Director, CBRE Capital Markets*

**Christina Hayhow**, *Vice President, PNC Real Estate*

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

2:15 PM - 3:15 PM

**GENERAL SESSION: To Infinity and Beyond - Defining the Future Servicing Workforce**

*Location: Carondelet, 3rd Floor*

Join your peers for an engaging discussion on the impact of remote and hybrid teams on team engagement, professional growth, and their effects on workforce and leadership development. Explore the challenges and opportunities presented by these evolving work structures, and gain valuable insights into strategies for fostering team cohesion, nurturing individual growth, and cultivating effective leadership in a changing landscape.

Speakers

**Charlotte Anne Croog, Jr.**, *Senior Director- Escrow Operations, JLL Capital Markets*

**Richard Pardoe, CCMS**, *Senior Vice President, Asset Management, M&T Realty Capital Corporation*

**Chris Shamaly**, *Executive Managing Director, CBRE Capital Markets*

**Rosie Sheehan**, *Director, Business Development, SS&C Technologies, Inc.*

**Lindsay Tarwater**, *Executive Director, WLS Real Estate – Agency Multifamily Servicing, JP Morgan Chase*

**Paula Williams Jackson, CCMS**, *Vice President, Chief Asset Manager, Manager of Asset Management, BWE*

3:00 PM - 4:00 PM

**Servicing Senior Executives & COMBOG Member Roundtable**

*Location: Studio 2, 2nd Floor*

3:15 PM - 3:30 PM

**Refreshment Break in the Exhibit Area**

*Location: Acadia, 3rd Floor*

Whether you're in the mood for a savory snack or sweet treat, we've got both. Come grab some popcorn or a world-famous New Orleans beignet. Sponsored by CoreLogic.

3:30 PM - 4:30 PM

**BREAKOUT SESSION: Investor Accounting & Bank Account Management**

*Location: Mardi Gras Ballroom Salon F-H, 3rd Floor*

Join your peers for an engaging discussion of how loan servicers are navigating best practices of money movement, combating fraud, streamlining bank reconciliation, and what they learned from the 2023 banking disruptions. Get unique perspectives as panelist from varying size operations detail how they are leveraging

technology to reduce risk and gain operational efficiencies to better serve their clients.

Speakers

**Ashley Fair**, *Vice President, Investor Reporting, Merchants Capital Corp.*

**Dan Kohrs**, *Vice President, Treasury Management, PNC Real Estate*

**Sara Litton**, *Controller & Servicing Director, Gantry*

**Bob Watson**, *Senior Vice President - Servicing, Walker & Dunlop, LLC*

3:30 PM - 4:30 PM

**BREAKOUT SESSION: Silver Linings - Combating Borrower Challenges with Winning Solutions**

*Location: Mardi Gras Ballroom Salon E, 3rd Floor*

Borrowers continue to report challenges with staying ahead of property maintenance, paying taxes and insurance, and tenant renewals. Join the conversation with Servicers as they discuss the challenges borrowers present created by the current market conditions and recommended resolutions.

Speakers

**Will Hasselmann**, *Vice President, Operations Manager, Grandbridge Real Estate Capital LLC*

**Laura Johnson**, *Asst. Director Commercial Loan Operations, Principal Real Estate*

**Chris Mason**, *Vice President, Asset Management, PGIM Real Estate*

**Jay Smith**, *Director, FHA/USDA Asset Management, Lument*

3:30 PM - 4:30 PM

**BREAKOUT SESSION: Evolution of Capital Sources & Asset Classes and the Impacts to Servicers**

*Location: Mardi Gras Ballroom Salon D, 3rd Floor*

In this session, hear the state of the industry across different asset classes and explore untapped opportunities such as the medical use of office space, potential retail growth, and emerging hotel sector trends. Identify preferred asset classes from the investors' perspective and examine how these preferences influence servicers.

Speakers

**Sharon Briskman**, *Executive Vice President, Greystone*

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

**Joe Lovell**, *Chief Administrative Officer, Colliers Mortgage*

**Derek Vander Veen, CCMS, CRI®**, *Senior Vice President of Business Development, Grandbridge Real Estate Capital LLC*

4:30 PM - 6:00 PM

**mPower Event: Clear Boundaries - Safety Tips for Business Women**

*Location: Carondelet, 3rd Floor*

Clear Boundaries- Every Business Woman Essential Safety Guide is the best selling book from co-authors, Jessica Peterson and Christine Beckwith, turned into a safety presentation that has changed the mindset of women everywhere about how they create safe boundaries, this book is a life saver, literally and figuratively. Based on the murders of two colleagues, Christine Beckwith takes the audience on an emotional journey through the dangers that are looming in and around women across the nation and especially those women traveling and interacting socially both in public and on line. Clear Boundaries will level up the safety of all the audience members creating a vigilant awareness around the violence and threats that surround us in modern America. Brought to you by mPower and as seen nationally more than 10,000 women have been certified with the CB Safety training. Come, meet Christine, get educated, level up your safety and that of your loved ones through shared lessons, get motivated and inspired while becoming protected.

Speakers

**Christine Beckwith**, *Chief Executive Officer, 20/20 Vision for Success Coaching & Consulting*

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

Wednesday, May 22, 2024

8:00 AM - 10:30 AM

**Registration**

*Location: Ballroom Foyer, 3rd Floor*

8:30 AM - 9:00 AM

**Continental Breakfast**

*Location: Ballroom Foyer, 3rd Floor*

9:00 AM - 10:30 AM

**Super Session (Closed to Media)**

*Location: Mardi Gras Ballroom Salon D, 3rd Floor*

Bring your comments and questions for a dynamic discussion on the hottest issues in Commercial/Multifamily Servicing regarding today's industry hot topics. This interactive session is an excellent forum to recap the week's learning. Feel free to attend in your travel attire and participate as long as your schedule permits.

Speakers

**Joni Brown-Haas, CCMS, Managing Director, PGIM Real Estate**

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

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

**Mary Hayes, Managing Director, Head of Wholesale Lending Services Real Estate Products Vertical, JP Morgan Chase**

**Steven R. Johnson, Managing Director of Closing and Servicing, Principal Real Estate**

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

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

**Katie Schwarting, Firmwide Board Member, Seyfarth Shaw LLP**