



## Preliminary Agenda

### **Monday, March 26**

*(Note: All sessions will be held in the Manhattan Ballroom on the lobby level)*

**9:00 am to 10:00 am—Industry Trends: Are We On the Way Back to 100,000 Plus Per Year?**

**10:15 am to 11:15 am—Current Policy Issues**

- **CFPB Reverse Mortgage Study & Examination Guidelines**
- **HUD Budget/Appropriations**
- **Congressional Issues**
- **FHA Lender Insurance Changes**

**11:15 pm-12:15 pm— Loan Officer Compensation Revisited: How Has the Industry Been Adjusting and What's Ahead?**

**12:15 pm to 1:30 pm—LUNCH ON YOUR OWN**

**1:30 pm to 3:00 pm— HUD Update: Are We in a Period of Stability?**

**3:15 pm to 4:00 pm—The Benefits of Corporate Social Responsibility**

**4:15 pm to 5:15 pm— What Originators Need to Know About the Capital Markets**

**5:30 pm to 7:00 pm—Networking Reception**

*Sponsored by Urban Financial Group, A Knight Capital Group, Inc. Company*

## **Tuesday, March 27**

*(Note: All sessions will be held in the Manhattan Ballroom on the lobby level)*

**8:30 am to 9:30 am—Successful Sales Strategies for HECM for Purchase and HECM Saver**

**9:30 am to 10:15 am—Protecting Your Business: Recognizing and Avoiding Fraud**

**10:30 am to 11:15 am—Ingredients for Effective Company Branding**

**11:15 am to 12:00 pm—How “Borrow with Confidence” Can Help Your Business Image**

**12 pm—NRMLA Eastern Regional Meeting Concludes**

### **Reverse Mortgage Securitization Forum**

**1:00 pm to 1:15 pm—Welcome Remarks**

**1:15 pm to 1:30 pm—Key Note Address**

**1:30 pm to 2:30 pm—Historical Perspectives and Performance of Reverse Mortgage Securities**

**2:30 pm to 3:30 pm—Issuers Roundtable**

- Servicing challenges
- Issuer economics
- Reserves strategies

**3:30 pm—BREAK**

**3:45 pm to 4:30 pm—Conversations with Leading Brokers and Dealers**

**4:30 pm to 5:00 pm—Investor Preferences and Concerns**

### **Confirmed Speakers**

Nancy Armour, Wendover Consulting

Michael Barone, Abrams Garfinkel Margolis Bergson, LLP

Al Benedetti, New View Advisors

James Brodsky, Weiner Brodsky Sidman Kider

Jean Callahan, Brookdale Center for Healthy Aging

Andy Cianci, Director, Processing and Underwriting Division, Philadelphia Home Ownership Center, HUD

Colin Cushman, Director, Portfolio Analysis, HUD  
Eric Declercq, Metlife  
Joe DeMarkey, Metlife  
Andy Dipietro, Director, Quality Assurance Division, Philadelphia Home Ownership Center, HUD  
Michael Drayne, Director of the Single Family Division, Office of Mortgage Backed Securities, Ginnie Mae  
Pete Engelken, Genworth Financial Home Equity Access  
David Fontanilla, Pioneer Analytics & Consulting Group LLC  
Jim Gilmartin, Coming of Age Inc.  
Karim Hatata, Genworth Financial Home Equity Access  
Karin Hill, Director, Single-Family Program Development, HUD  
To Hol, Sterne Agee  
Erica Jessup, Housing Policy Specialist, HUD  
Michael Kent, Reverse Mortgage Solutions  
Brett Kirkpatrick, Mortgage Financial, Inc.  
John Kozak, Account Executive, Ginnie Mae  
Jeff Lewis, Generation Mortgage Company  
Daniel Lichtenberg, Bank of America Merrill Lynch  
Derek Marks, Metlife  
Sarah P. Martin, Chief, Single Family Claims Branch, HUD  
Steve McClellan, Urban Financial Group  
Mike McCully, New View Advisors  
Teague McGrath, American Advisors Group  
James Milano, Weiner Brodsky Sidman Kider  
Jean Noble, J. Noble Consulting  
Edward O'Connor, Generation Mortgage Company  
Carl Rojas, Generation Mortgage Company  
Ruth Roman, Director, Program Support, HUD  
Victor C. Saratella, CFA, Liberty Mutual Group Asset Management Inc.  
Julie Shaffer, Director, Philadelphia Home Ownership Center, HUD  
Darren Stumberger, Knight Capital Group  
Neil Sweren, Southern Trust Mortgage  
Jerry Tomlin, Atlantic Bay Mortgage Group  
Jeff Traister, Cantor Fitzgerald  
Alain Valles, Direct Finance Corporation  
Michelle Zachensky, MetLife