



Preliminary Agenda

Sunday, November 9

Registration Hours

2:00 pm to 6:00 pm

Monday, November 10

Registration hours

7:30 am to 6:30 pm

Exhibit Hall Hours

7:30 am to 11:30 am OPEN

11:30 am to 12:30 pm CLOSED

12:30 pm to 3:00 pm Lunch/OPEN

3:00 pm to 5:00 pm – CLOSED

5:00 pm to 6:30 pm – OPEN

General Session I—Poinciana 1/2

8:30 am to 11:30 am

Federal Financial Assessment Guidelines for HECM Borrowers (3 NMLS/3 CRMP Credits)

General Session II—Americana 3

11:30 am to 12:30 pm

Opening Remarks

“Reverse Mortgage Reset: Insights From the Corner Office”

Networking Lunch

12:30 pm to 1:30 pm—Exhibit Hall

Concurrent Session 1— Poinciana 1/2

1:30 pm to 2:30 pm

Financial Safeguards for Older Adults (1 NMLS/1 CRMP Credit)

Concurrent Session 2— Poinciana 3/4

1:30 pm to 2:30 pm

The Aging in Place Lifestyle

Concurrent Session 3—Americana 2

1:30 pm to 3:00 pm

Servicing Committee (Closed session)

General Session III—Americana 3

3:00 pm to 3:45 pm

The Effect of Children on Retirement

Presenter: Rick Miller, Sensible Financial, Waltham, MA

3:45 pm to 4:30 pm

Putting Together a Retirement Funding Package

Concurrent Session 4— Poinciana 1/2

4:30 pm to 5:30 pm

Creating Your Own Social Media Plan

Concurrent Session 5— Poinciana 3/4

4:30 pm to 5:30 pm

The Condo Conundrum

Networking Reception sponsored by LRES Corporation and Fidelity Homestead Associates—Exhibit Hall

5:30 pm to 6:30 pm

Tuesday, November 11

Registration Hours

7:30 am to 4:00pm

Exhibit Hall Hours

7:30 am to 10:30 am OPEN

10:30 am to 12:30 pm – CLOSED

12:30 pm to 1:30 pm – LUNCH/OPEN

1:30 pm to 3:00 pm – CLOSED

3:00 pm to 5:30 pm – OPEN

5:30 pm – CLOSED

Continental Breakfast—Exhibit Hall

7:30 am to 9:00 am

Concurrent Session 6— Poinciana 1/2

8:30 am to 10:30 am

An Insightful Explanation of the NRMLA Code of Ethics & Its Impact on Our Daily Routine

(Pre-registration required. 2 NMLS/2 CRMP credits)

Concurrent Session 7— Poinciana 3/4

9:30 am to 10:30 am

What Makes Counseling Most Effective?

General Session IV—Americana 3

10:30 am to 11:30 am

An Update on NRMLA Activities

11:30 am to 12:30 pm

HECM Update from Key HUD Staff

Networking Lunch

12:30 pm to 1:30 pm—Exhibit Hall

General Session V—Americana 3

1:30 pm to 2:15 pm

Housing America's Older Adults

Presenter: Chris Herbert, Harvard Joint Center for Housing Studies, Cambridge, MA

2:15 pm to 3:00 pm

Keynote Speaker

Featuring Kathleen Zadareky, Deputy Assistant Secretary for Single Family Housing, U.S. Department of Housing and Urban Development, Washington, D.C.

Concurrent Session 8— Poinciana 1/2

3:30 pm to 5:30 pm

Servicing HECMs: Reverse Mortgage Loan Administration Procedures

(2 NMLS/2 CRMP Credits)

Concurrent Session 9—Poinciana 3/4

3:30 pm to 4:30 pm

Extreme Summit Next Steps: Roundtable Discussion

4:30 pm to 5:30 pm

How to Read and Explain an Appraisal

Wednesday, November 12

Registration Hours

7:30 am to 12:30 pm

Exhibit Hall Hours

7:30 am to 9:00 pm OPEN

9:00 am CLOSED/Dismantle exhibits

Continental Breakfast—Exhibit Hall

7:30 am to 9:00 am

Concurrent Session 10— Poinciana 1/2

9:00 am to 9:50 am

Developing Your Own Brand

Concurrent Session 11—Poinciana 3/4

9:00 am to 9:50 am

CRMP Meeting (Open to all attendees)

General Session VI—Americana 3

10:00 am to 10:50 am

Legislative/Regulatory Update

11:00 am to 11:50 am

New Approaches to Funding Retirement

11:50 am

Closing Remarks and Adjourn

1:00 pm to 5:00 pm

Reverse Mortgage Open Golf Tournament