



2021 WESTERN SECONDARY MARKET CONFERENCE



WALDORF ASTORIA MONARCH
BEACH RESORT & CLUB | AUG. 24-26, 2021

Tuesday, August 24

7:00 am – 2:00 pm

Location: Waldorf Astoria Monarch Beach Golf Links

CAMPAC Golf Tournament

Separate registration through the California MBA required

11:30 a.m. – 5:00 p.m.

Location: Waldorf Astoria Monarch Beach Resort, Pacific Ballroom Promenade
Conference Registration

12:00 – 5:00 p.m.

Welcoming Reception in registration area

Sponsored by: Computershare Loan Services

“Down to Business”

12:00 p.m. – 3:00 p.m.

Client Meetings – Brella Tables, Sponsor tables and Company Meeting Rooms

2:00 p.m. – 3:00 p.m.

mPower Reception

Networking and champagne toast

Location: Pacific Ballroom Promenade

3:00 p.m. – 4:00 p.m.

Session 1 – mPower Leadership Panel

Session Sponsor: Moss Adams

Location: Pacific Ballroom 2

Moderator: **Marcia Davies**, Chief Operating Officer, MBA

Speakers: **Patty Arvielo**, President, *New American Funding*

Jean Bradley, VP Strategic Business Development, *Essent Guaranty*

Marianne Mainardi, SVP Correspondent Lending, *NewRez Correspondent*

Mary Ann McGarry, CEO, *Guild Mortgage*

4:00 p.m. – 5:00 p.m.

Session 2 – How Tech Got It's Groove Back...In Mortgage Lending

Session Sponsor: LBA Ware
Qualia

Location: Pacific Ballroom 2

Moderator: **Adam Chaudhary**, President, *Funding Shield*

Speakers: **Jamil Atcha**, Enterprise Account Executive, *SimpleNexus*

Lori Brewer, CEO, *LBA Ware*

Alex Kutsishin, CEO, *Sales Boomerang*

Camelia Martin, Head of Industry and Regulatory Affairs, *SnapDocs*

Scott Roberts, SVP of Sales, *Insellerate*

6:00 p.m. – 9:00 p.m.

All Attendee Party: Location – Grand Lawn

Wednesday, August 25

8:00 a.m. – 5:00 p.m.

Location: Waldorf Astoria Monarch Beach Resort, Pacific Ballroom Promenade

Conference Registration

8:00 a.m. – 5:00 p.m.

“Down to Business”

Client Meetings – Brella Tables, Sponsor tables and Company Meeting Rooms

8:00 a.m. – 10:00 a.m.

Breakfast

Location: Exhibit Hall (Pacific Ballroom Foyer)

Conference Welcome

8:45 a.m. – 9:15 a.m.

Location: Pacific Ballroom 2

Conference Welcome and Opening Remarks from Conference Chairman – John Hedlund, COO and Managing Director, *AmeriHome Mortgage*

California Mortgage Bankers Association - A Year in Review, California MBA Board Chair, Bill Lowman, President and CEO, *American Pacific Mortgage*

9:15 a.m. – 10:15 a.m.

Session 3 – Capital Markets Update

Session Sponsor: LoanLogics

Location: Pacific Ballroom 2

Moderator: **James Baublitz**, Managing Director, Pipeline Analytics, *Black Knight*

Speaker: **David Battany**, EVP Capital Markets, *Guild Mortgage*

Phil Rasori, COO, *Mortgage Capital Trading MCT*

Chito Schnupp, Chief Investment Officer, *American Pacific Mortgage*

Bill Zaboski, Executive Director, Pricing Operations / Correspondent Finance, *Chase*

10:15 – 10:30 a.m. Refreshment Break Sponsored by TBD – (Pacific Ballroom Foyer)

10:30 – 11:30 a.m.

Session 4 – Keynote Speaker

Session Sponsor: Black Knight

Location: Pacific Ballroom 2

Speaker: Leigh Steinberg, American Sports Agent

During his 41-year career, Steinberg has represented over 300 professional athletes in football, baseball, basketball, boxing, and Olympic sports. He has represented the No. 1 overall pick in the NFL draft a record eight times. Steinberg is often credited as the real-life inspiration of the sports agent from Cameron Crowe's film *Jerry Maguire* in 1996

11:30 a.m. – 12:30 p.m.

Session 5 – CEO Panel

Session Sponsor: Clear Capital
Deephaven

Location: Pacific Ballroom 2

Moderator: **John Hedlund**, COO & Managing Director, *Amerihome Mortgage Company*

Speakers: **Bob Broeksmit**, CEO, *MBA*

Mike Fontaine, Co-President & COO, *Plaza Home Mortgage*

Christina Pham, CEO, *JMAC Lending*

12:30 – 1:30 p.m. – Lunch break (*Grab and Go lunch boxes provided*)

Lunch Sponsors:

Location: Pacific Ballroom Foyer and Monarch Ballroom Foyer

1:45 p.m. – 2:15 p.m.

Session 6 – More Than Just Talking about DE&I – What the California MBA DE&I Committee is Doing

Session Sponsor: Tavant

Location: Pacific Ballroom 2

Moderator: **Susan Milazzo**, CEO, *California MBA*

Speakers: **Paul Gigliotti**, COO, *Pinnacle Home Loans*

Rosalyn Hardy, CEO, *QCP Systems*

Ian Rambarran, Shareholder, *Klinedinst PC*

2:15 p.m. – 3:15 p.m.

Session 7 – Mergers and Acquisitions

Session Sponsor: MGIC

Location: Pacific Ballroom 2

Moderator: **Bill Lowman**, President & CEO, *American Pacific Mortgage*

Speakers **Jim Furash**, CEO, *Amerihome Mortgage Company*

Jeff Levine, Managing Director/Global Head, *Houlihan Lokey*

Joe Tyrrell, President, *ICE Mortgage Technology*

“Down to Business”

3:00 p.m. – 5:00 p.m.

Client Meetings – Brella Tables, Sponsor tables and Company Meeting Rooms

Thursday, August 26

8:30 a.m. – 9:30 a.m.

Breakfast

Location: Exhibit Hall (Pacific Ballroom Foyer)

“Down to Business”

8:00 a.m. – 9:00 a.m.

Client Meetings – Brella Tables, Sponsor tables and Company Meeting Rooms

9:00 a.m. – 9:30 a.m.

Session 8 – Welcome to our California Regulator

Session Sponsor: CWDL

Location: Pacific Ballroom 2

Moderator: **Wes Iseley**, Senior Managing Director, *Carrington Mortgage Services, LLC*

Speakers: **Ed Gill**, Senior Deputy Commissioner, *California Department of Financial Protection and Innovation (DFPI)*

9:30 a.m. – 10:30 a.m.

Session 9 – Navigating the Future of Servicing

Session Sponsor: Sutherland

Location: Pacific Ballroom 2

Moderator: **Ramie Word**, SVP Default Servicing, *Mr. Cooper*

Speakers: **Joe DeDominicis**, CFO/CTO, *NRL Mortgage*

Jay Jones, SVP Servicing, *Mr. Cooper*

Jason Kwasny, EVP Servicing, *The Money Source*

10:30 a.m. – 10:45 a.m. *Sponsored by TBD*

Refreshment Break – Pacific Ballroom Foyer

10:45 a.m. – 12:00 p.m.

Session 10 – Non-QM Roundtable Discussion

Session Sponsors: Angel Oak Mortgage Solutions
PHH Mortgage

Location: Pacific Ballroom 2

Moderator: **Nick Pabarcus**, EVP Wholesale Lending, *Stearns Lending, LLC*

Speakers: **Tom Hutchens**, EVP, Production, *Angel Oak Mortgage Solutions*

John Keratsis, President & CEO, *Deephaven*

Jeffrey Lemieux, Managing Director, Correspondent Lending, *Acra Lending*

John Lynch, CEO/Founder, *PCMA*

Shea Pallante, President, *Sprout Mortgage*

Jeff Schaefer, EVP, National Sales, *Verus Mortgage Capital*

“Down to Business”

12:00 – 2:00 p.m.

Client Meetings – Brella Tables, Sponsor tables and Company Meeting Rooms

Conference Adjourns