

COMMERCIAL / MULTIFAMILY FINANCE SERVICING AND TECHNOLOGY CONFERENCE

MAY 9-12 | SHERATON GRAND CHICAGO RIVERWALK



Commercial/Multifamily Finance Servicing and Technology Conference

Tuesday, May 9, 2023

3:00 PM - 4:00 PM

Life Insurance Company Executive Roundtable

Location: Ohio

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 - 6:00 PM

Registration

Location: Chicago Promenade West

3:30 PM - 4:30 PM

FHA Servicers Subcommittee (Committee Members Only; Closed to Media)

Location: Chicago Ballroom X

3:30 PM - 5:00 PM

mPact Servicing Advisory Committee

Location: Wrigleyville

4:00 PM - 5:00 PM

CCMS Designee Committee Meeting (Committee Members Only; Closed to Media)

Location: Gold Coast

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

5:00 PM - 6:00 PM

CCMS Reception (Open to Members; Closed to Media)

Location: Fountainview

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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.

5:00 PM - 6:00 PM

mPact Reception (Open to Members; Closed to Media)

Location: Riverwalk Esplanade

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.

Wednesday, May 10, 2023

7:30 AM - 8:30 AM

Closing Committee Breakfast (Open to Members; Closed to Media)

Location: Chicago Ballroom X

7:30 AM - 5:30 PM

Exhibit Area Open

Location: Sheraton Ballroom V

7:30 AM - 5:30 PM

Registration

Location: Chicago Promenade West

8:00 AM - 8:30 AM

Continental Breakfast in the Exhibit Area

Location: Sheraton Ballroom V

8:00 AM - 5:00 PM

Member/Advocacy Engagement Zone

Location: Ballroom Promenade

8:30 AM - 9:45 AM

Opening General Session: The New Office Space

Location: Chicago Ballroom VI

After opening remarks on the commercial/multifamily real estate finance landscape from MBA's 2023 Chairman and President of Colliers Mortgage, Matt Rocco, an expert panel discusses one of today's hottest topics: office space occupancy and usage. Hear what's happening in Chicago, one of the largest and most resilient markets, and how those trends may be seen across the country. This session also celebrates the newest recipients of the Commercial Certified Mortgage Servicer (CCMS) designation.

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Speakers

Jeff Breaden, *Executive Vice President of Finance, Asset Management and Capital Markets, Prime Group, Inc.*

Christine R. Chandler, *Executive Vice President, Chief Credit Officer & Chief Operating Officer, M&T Realty Capital Corporation*

Matthew G. Rocco, Sr., *2023 MBA Chairman, President, Colliers Mortgage*

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

9:45 AM - 10:00 AM

Refreshment Break in the Exhibit Area

Location: Sheraton Ballroom V

10:00 AM - 10:50 AM

General Session: Market Outlook

Location: Chicago Ballroom VI

From vacancies and rents to valuations and sales transactions to interest rates, origination volumes and loan performance, commercial and multifamily real estate markets are changing quickly. MBA's AVP of Commercial/Multifamily Research, Reggie Booker, and Head of Commercial Real Estate Research, Jamie Woodwell, discuss the latest on the economy and the CRE marketplace, with a special focus on issues of importance to commercial and multifamily 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.

Speakers

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

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

11:00 AM - 12:00 PM

CRE Servicing Basics: The Role of the Servicer

Location: Sheraton Ballroom I

Get an overview of commercial/multifamily loan servicing and the servicer's role in the CMF finance ecosystem. Learn who the key players are and the various servicing platforms used. This session is one part of a

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four-part track designed for anyone seeking a more well-rounded understanding of servicing, including those new to their role, those seeking a refresher or those fulfilling required training hours. Attendees of this track are eligible to be enrolled in the CRE Basics: Introduction to CMF Loan Servicing online course (\$400 value) at no additional cost to complete any parts not completed at the conference, take the online assessment, earn a Certificate of Completion, and receive 5 points toward the CCMS designation. Open to all registered conference attendees.

Speakers

Daniel J. Phelan, CMB, CRI, CCMS, *Chief Executive Officer, Pacific Southwest Realty Services*

Derek Vander Veen, CCMS, CRI®, *Business Development Manager, Grandbridge Real Estate Capital LLC*

11:00 AM - 12:00 PM

Technology in Servicing: From Cradle to Grave

Location: Sheraton Ballroom III

Technology is ever changing in all industries, and Servicing does not get left behind here. In this session, you will hear from industry experts on the evolution of technology in Servicing and walk through tech changes behind each request and how they support the life of the loan.

Speakers

Michael S. Merriam, *Senior Vice President-Operational Risk, DBRS Morningstar*

Kimberly Middleton, *SVP, Technology Account Management, PNC Real Estate*

Beth Plourd, *AVP/Sr. Director, Lincoln Financial Group*

Jenny Walter, *Product Owner, M&T Realty Capital Corporation*

11:00 AM - 12:00 PM

The Rise of Interest Rate Caps

Location: Sheraton Ballroom II

As interest rate caps continue to rise, Servicers are left to find creative

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solutions for borrowers. Join this session to learn how other servicers are monitoring payments, the modifications borrowers are requesting, and the creative solutions Servicers are coming up with.

Speakers

Brandy Deboutse, *Director Underwriting and Credit Analysis, Pacific Life Insurance Company*

Kristi Dowdle, *Director, Servicing, Lument*

Darren M. Peters, *Vice President, Loan Servicing, PNC Real Estate*

Jonathan Schreiber, *Director, Chatham Financial Corp.*

12:00 PM - 1:30 PM

CMF Education Networking Group: Roundtable and Luncheon (Open to Members; Closed to Media)

Location: Gold Coast

The Commercial/Multifamily Education Networking Group (CMF ENG) has been formed to facilitate ongoing conversations around the evolution of learning and development in the CMF space. Our roundtable discussion will be led by Lindsay Minch, Vice President of Learning & Development at PNC Midland, and Jan Sternin, Senior Vice President at Berkadia, who will facilitate a collaborative discussion with attendees on recent industry trends impacting learning strategies and delivery methods for a hybrid workforce. RSVP to smcgory@mba.org

12:00 PM - 1:00 PM

Commercial Real Estate Legal Council (Open to Members; Closed to Media)

Location: Wrigleyville

All MBA member attendees are welcome to join us for lunch and 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.

12:00 PM - 1:00 PM

Insurance & Risk Management Committee (Open to Members; Closed

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to Media)

Location: Chicago Ballroom X

All MBA members focused on insurance coverage assets and risk management are welcome to join this meeting to hear an update on the committee's work while enjoying lunch.

12:00 PM - 1:00 PM

Networking Lunch in the Exhibit Area

Location: Sheraton Ballroom V

12:00 PM - 1:30 PM

Presentation: StanCorp (By Invitation Only)

Location: Michigan AB

12:00 PM - 12:30 PM

Q&A on Industry Leadership

Location: Sheraton Ballroom V

Interested in becoming an industry leader? Bring your questions and get insight during this unique opportunity for Q&A with two of our industry's top leaders, MBA's 2023 Chairman Matt Rocco, President of Colliers Mortgage; and MBA's Commercial Board of Governor (COMBOG) Chair Christine Chandler, Executive Vice President, Chief Credit Officer & Chief Operating Officer of M&T Realty Capital. Hear about their careers, paths to MBA leadership, and their advice on growing your leadership skills.

Speakers

Christine R. Chandler, *Executive Vice President, Chief Credit Officer & Chief Operating Officer, M&T Realty Capital Corporation*

Matthew G. Rocco, Sr., *2023 MBA Chairman, President, Colliers Mortgage*

12:00 PM - 1:00 PM

Servicing Operations Working Lunch

Location: Streeterville

Open to servicing professionals supporting all aspects of servicing operations, join this lunch meeting to discuss hot topics, hear from guest speakers, and share ideas related to commercial real estate servicing (current MBA members only).

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1:00 PM - 2:00 PM

Catastrophic Events Shaping the Insurance Market

Location: Sheraton Ballroom III

We are all familiar with the California fires and coastal hurricanes and how they are impacting the ability to get coverage in these areas. This session discusses the various catastrophic events that have shaped the insurance market; the impacts of these events on the insurance industry and how this is all affecting the force-placement insurance market.

Speakers

Jeff Giudici, *Vice President, Walker & Dunlop, LLC*

Melissa Keyne Johnson, *Escrow Manager, Colliers Mortgage*

Misty Leeth, *Managing Director, Lument*

Nick C. Yuhas, *Senior Vice President & Managing Director, Althans Insurance Inc.*

1:00 PM - 2:00 PM

CRE Servicing Basics: Servicing Agreements and Compliance

Location: Sheraton Ballroom I

Gain an understanding of the guidelines that shape servicing operations. Hear what there is to know about servicing's governing documents and the current regulatory environment. This session is the second part of a four-part track designed for anyone seeking a more well-rounded understanding of servicing, including those new to their role, those seeking a refresher, or those fulfilling required training hours. Attendees of this track are eligible to be enrolled in the CRE Basics: Introduction to CMF Loan Servicing online course (\$400 value) at no additional cost to complete any parts not completed at the conference, take the online assessment, earn a Certificate of Completion, and receive 5 points toward the CCMS designation. Open to all registered conference attendees.

Speakers

Daniel J. Phelan, *CMB, CRI, CCMS, Chief Executive Officer, Pacific Southwest Realty Services*

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1:00 PM - 2:00 PM

Derek Vander Veen, CCMS, CRI[®], *Business Development Manager, Grandbridge Real Estate Capital LLC*

Managing Assumptions and Modifications Requests

Location: Sheraton Ballroom II

Over the years, assumptions and modification requests have become more complicated. This session walks you through the critical pieces of the requests and reviews how servicing shops manage the increasing complexity.

Speakers

Natalie Davis, *Portfolio Manager, Symetra Life Insurance Company*

Felicia Everett-Rounds, *Vice President, CWCapital Asset Management LLC*

Jason Rippe, *Director, Asset Management, PGIM Real Estate*

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

2:00 PM - 3:15 PM

DUS Operations Subcommittee (By Invitation Only)

Location: Mississippi

2:15 PM - 3:15 PM

CCMS Training Track: Surveillance Fundamentals

Location: Sheraton Ballroom I

In this first session in a series of 5, gain and understanding of the servicer's role in monitoring the collateral, including the ethics that must be adhered to and the surveillance tools available. This session is part of a track designed for anyone seeking a deeper knowledge of servicer surveillance, including those new to their role, those seeking a refresher, or interested in pursuing their Commercial Mortgage Servicer (CCMS) Designation. Attendees of this track are eligible to be enrolled in the full CCMS Level 1 Certificate Program (\$550 value) at no additional cost to complete the rest of the Servicer Surveillance series, as well as the four remaining online self-study courses in the Level I certificate series before taking the final assessment (and earning 15 CCMS points).

Speaker

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2:15 PM - 3:15 PM

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

General Session: Loan Maturities - What to Expect When Expecting
Location: Chicago Ballroom VI

Maturities are at the top of everyone's mind and what is to come as the wave of loans mature in the next few years. Join a group of industry experts who will discuss what we are expecting in this era of maturities and what's different from prior cycles.

Speakers

Leslie Hayton, *CCMS, Head of CMBS Asset Management, Wells Fargo Bank, N.A.*

Michael Heagerty, *CCMS, Principal, Gantry*

Andrea Helm, *Senior Vice President, PNC Real Estate*

Michael S. Tanner, *Principal and Executive Vice President, Pacific Southwest Realty Services*

3:15 PM - 3:30 PM

Refreshment Break in the Exhibit Area
Location: Sheraton Ballroom V

3:30 PM - 4:30 PM

CCMS Training Track: Loan Surveillance
Location: Sheraton Ballroom I

Continue the discussion of servicer surveillance in this review of other key areas, including borrower performance, real estate taxes, property insurance, escrows, and reserves. This session is the second of five in a track designed for anyone seeking a deeper knowledge of servicer surveillance, including those new to their role, those seeking a refresher, or interested in pursuing their Commercial Mortgage Servicer (CCMS) Designation. Attendees of this track are eligible to be enrolled in the full CCMS Level 1 Certificate Program (\$550 value) at no additional cost to complete the rest of the Servicer Surveillance series, as well as the four remaining online self-study courses in the Level I certificate series before taking the final assessment (and earning 15 CCMS points).

Speaker

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3:30 PM - 4:30 PM

Jennifer L. Shedden, *SVP, Asset Management Supervisor, Colliers Mortgage*

Life of A Loan: Today's Servicer Challenges

Location: Sheraton Ballroom III

Servicers are tasked with being ready for anything at any time, necessitating that both infrastructure and staff are able to adapt and pivot in real-time. Whether it's anticipated market and operational changes or unexpected issues, there is never a dull moment in the life of a servicer. Join us for a conversation with your industry peers to discuss today's challenges that are keeping servicers as busy as ever.

Speakers

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

Laura J. Smith, *Senior Managing Director, Head of Servicing, Newmark*
William David Spearman, *Vice President & Managing Director, Lincoln Financial Group*

3:30 PM - 4:30 PM

Jan Sternin, CMB, *Senior Vice President, Managing Director, Berkadia*
Utilizing Technology in Investor Reporting: Trends, Opportunities, and Challenges

Location: Sheraton Ballroom II

As investors require more data to analyze their portfolios, how are servicers keeping up with the demand? This session reviews the challenges Investor Reporting teams are facing, lessons learned, and how to optimize the use of technology beyond spreadsheets to meet the new requirements.

Speakers

Roberto Garcia, *Director, Lument*

James Hull, *Senior Director Loan Servicing, Fannie Mae Multifamily*

Cindy Ina, *MF Asset Mgmt Dir, Freddie Mac Multifamily*

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

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4:30 PM - 5:30 PM

Opening Reception in the Exhibit Area: Windy City Social

Location: Sheraton Ballroom V

5:30 PM - 6:30 PM

MBA Advocacy Reception (Current "active" MAA Members Only; Sign-Up at the Door) (Closed to Media)

Location: Ballroom Promenade

Thursday, May 11, 2023

7:30 AM - 5:30 PM

Registration

Location: Chicago Promenade West

8:00 AM - 8:30 AM

Continental Breakfast in the Exhibit Area

Location: Sheraton Ballroom V

8:00 AM - 3:30 PM

Exhibit Area Open

Location: Sheraton Ballroom V

8:00 AM - 5:00 PM

Member/Advocacy Engagement Zone

Location: Ballroom Promenade

8:30 AM - 9:45 AM

DUS Chief Asset Managers Subcommittee (By Invitation Only)

Location: Mississippi

8:30 AM - 9:30 AM

General Session: What to Expect during a Downturn

Location: Chicago Ballroom VI

If anything is certain in the mortgage industry, it's the cyclical ups and downs. This session will discuss the differences of the last three major industry cycles, the evolution of the responses to each event, the common themes and industry best practices.

Speakers

Bonnie Yvette Hochman Rothell, Esq., Partner, Morris, Manning & Martin, L.L.P.

Alan B. Kronovet, Jr., CCMS, Head of Commercial Mortgage Servicing, Wells Fargo Bank, N.A.

Dan Olsen, CCMS, Senior Vice President, Key Commercial Bank & Real Estate Capital, KeyCorp

Daniel J. Phelan, CMB, CRI, CCMS, Chief Executive Officer, Pacific Southwest Realty Services

9:30 AM - 9:45 AM

Refreshment Break in the Exhibit Area

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9:45 AM - 10:45 AM

Location: Sheraton Ballroom V

CRE Servicing Basics: Servicing Operations

Location: Sheraton Ballroom I

Join this session to explore the primary duties and responsibilities of the servicer in servicing operations. (is this description complete?) This session is the third part of a four-part track designed for anyone seeking a more well-rounded understanding of servicing, including those new to their role, those seeking a refresher or those fulfilling required training hours. Attendees of this track are eligible to be enrolled in the CRE Basics: Introduction to CMF Loan Servicing online course (\$400 value) at no additional cost to complete any parts not completed at the conference, earn a Certificate of Completion, take the online assessment, and receive 5 points toward the CCMS designation. Open to all registered conference attendees.

Speaker

Tanya L. Bryan, CCMS, Director, SMI Operations, StanCorp Mortgage Investors, LLC

9:45 AM - 10:45 AM

Property Condition: How to Service FHA Multifamily and Healthcare Properties

Location: Sheraton Ballroom III

Hear from HUD Officials and FHA Servicers about how to manage challenges with NSPIRE and completion repairs. Learn how to work through inconsistent requirements and rigorous deadlines. Discuss what guidance would help make these processes less onerous.

Speakers

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

Samantha Brooks, Vice President, FHA, USDA & Non-Agency Asset Management, Greystone

Michael R. Bruggman, Director, Asset and Counterparty Oversight, U.S. Department of Housing and Urban Development

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9:45 AM - 10:45 AM

Angela Collier Mills, *Deputy Director, Asset Management, United States Department of Housing and Urban Development*

Philip Head, *Director, Asset Mgmt, ORCF, U.S. Department of Housing and Urban Development*

Technology and Resiliency

Location: Sheraton Ballroom II

In this session, industry leaders discuss adopting new technologies and platforms, using digital tools, and an evolving view on resiliency, such as operational resiliency, forces businesses to re-allocate resources, adjusting frameworks and roles.

Speakers

Brett E. Adams, *SVP-Managing Director-Servicing, Berkadia*

Elaine Furnari, *Head of Loan Services, Citco Loan Services (USA) Inc.*

Mike Kenney, *VP- MF Operational Risk, Freddie Mac Multifamily*

Laura Krashakova, *Chief Executive Officer, Smart Capital*

11:00 AM - 12:00 PM

CRE Servicing Basics: Asset Management

Location: Sheraton Ballroom I

Attendees will learn the main duties and responsibilities of the asset manager, including providing the information identified by the investors to aid in their management of the loan performance. Hear how to handle performing and non-performing loans as an asset manager. This session is the fourth part of a four-part track designed for anyone seeking a more well-rounded understanding of servicing, including those new to their role, those seeking a refresher or those fulfilling required training hours. Attendees of this track are eligible to be enrolled in the CRE Basics: Introduction to CMF Loan Servicing online course (\$400 value) at no additional cost to complete any parts not completed at the conference, take the online assessment, earn a Certificate of Completion, and receive 5 points toward the CCMS designation. Open to all registered conference attendees.

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Speakers

Anne Doty, CCMS, Senior Vice President, Grandbridge Real Estate Capital LLC

Michael Heagerty, CCMS, Principal, Gantry

Ease of Closing: Best Practices, Tips & Tricks

Location: Sheraton Ballroom III

11:00 AM - 12:00 PM

Gain actionable advice to stay in front of items that commonly cause closing delays, including insurance, title challenges, surveys & zoning, and other challenges.

Speakers

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

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

Deanna Lee, Jr., Senior Vice President, BWE

Heather Wright, Partner, Bradley Arant Boult Cummings LLP

The Impact of Special Servicers

Location: Sheraton Ballroom II

11:00 AM - 12:00 PM

As loans mature and property valuations decline, special servicing continues to be top-of-mind. An expert panel provides insight into the role of special servicing and where the industry is headed.

Speakers

Sharon Briskman, Executive Vice President, Greystone

Richard Carlson, Managing Director, DBRS Morningstar

Arren Goldman, Esq., Partner, Seyfarth Shaw LLP

Mike Jenkins, Vice President, Key Commercial Bank & Real Estate Capital, KeyCorp

Asset Manager Peer Group (Open to Members; Closed to Media)

Location: Chicago Ballroom X

12:00 PM - 1:00 PM

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If you are an MBA member who focuses on asset management, capital improvements, covenant tracking, property inspections, property management, rent rolls, or tenant relationships, join us for this lunch meeting to network and hear from your peers.

12:00 PM - 1:00 PM

Networking Lunch in the Exhibit Area

Location: Sheraton Ballroom V

12:00 PM - 1:30 PM

Servicing Senior Executive Roundtable (Committee Members Only; Closed to Media)

Location: Wrigleyville

12:00 PM - 1:00 PM

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

Location: Gold Coast

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

1:00 PM - 2:00 PM

CCMS Training Track: Property Surveillance

Location: Sheraton Ballroom I

This session examines the servicer's role in monitoring the collateral. Learn what is involved in property surveillance. Including common risks associated with each commercial property type, important considerations during a property inspection, and other tenant-related issues. This session is the third of five in a track designed for anyone seeking a deeper knowledge of servicer surveillance, including those new to their role, those seeking a refresher, or interested in pursuing their Commercial Mortgage Servicer (CCMS) Designation. Attendees of this track are eligible to be enrolled in the full CCMS Level 1 Certificate Program (\$550 value) at no additional cost to complete the rest of the Servicer Surveillance series, as well as the four remaining online self-study courses in the Level I certificate series before taking the final assessment (and earning 15 CCMS points).

Speaker

Shannon M. Carmack, CCMS, Director - Commercial Mortgage Analytics

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1:00 PM - 2:00 PM

and Administration, Ameritas Investment Partners

Compliance of Servicing Covenants

Location: Sheraton Ballroom II

As loans have gotten more complicated over the past decade, what are the Servicing and Treasury Management effects? This panel dives into the implications of non-compliance of servicing covenants, and the difficulty of implementing cash-managed loans.

Speakers

Adam Fox, *Senior Director, Fitch Ratings*

Adrienne Huffman, *Director, Nuveen Real Estate*

Dana Jo Martino, CCMS, *SVP - Managing Director -Servicing, Berkadia*

Nikkole Test, *Vice President, Operations Manager Senior, PNC Real Estate*

1:00 PM - 2:00 PM

Onboarding and Continuing Education for Today's Talent Stack

Location: Sheraton Ballroom III

Employee engagement is in the headlines nationwide. Join industry peers for a discussion of how to successfully use ongoing education and training to increase employee engagement and satisfaction.

Speakers

Katie Bronec, *Executive Director, JP Morgan Chase*

Paula Williams Jackson, CCMS, *Managing Director, Wells Fargo Bank, N.A.*

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

Pranika Sinha, *Managing Director DEI & Organizational Development, Greystone*

2:15 PM - 3:15 PM

CCMS Training Track: Performance Surveillance

Location: Sheraton Ballroom I

Gain insight on performance surveillance, including financial statement analysis, monetary and non-monetary default, trigger and compliance

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tests. This session is the fourth of five in a track designed for anyone seeking deeper knowledge of servicer surveillance, including those new to their role, those seeking a refresher, or interested in pursuing their Commercial Mortgage Servicer (CCMS) Designation. Attendees of this track are eligible to be enrolled in the full CCMS Level 1 Certificate Program (\$550 value) at no additional cost to complete the rest of the Servicer Surveillance series, as well as the four remaining online self-study courses in the Level I certificate series before taking the final assessment (and earning 15 CCMS points).

Speaker

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

2:15 PM - 3:15 PM

General Session: Managing the Cybersecurity Risk with Third Parties

Location: Chicago Ballroom VI

In a world where cybersecurity threats have become the new normal, servicers must be keenly aware of potential risk related to third party vendors. This session takes a look at tools and vendor management procedures servicers have put in place in order to close their exposure window.

Speakers

Jason Berry, *Chief Operating Officer, Slatt Capital*

Brian L. Hanson, *Managing Director, CWCapital Asset Management LLC*

Kevin McCollam, *Sr. IT Manager/Product Owner, Northmarq*

Mike Smith, *Founder and Chief Executive Officer, Axis Insurance Services*

3:15 PM - 3:30 PM

Refreshment Break in the Exhibit Area

Location: Sheraton Ballroom V

3:30 PM - 4:30 PM

CCMS Training Track: Surveillance Findings

Location: Sheraton Ballroom I

Gain an understanding of the surveillance reporting requirements, watchlist reporting, and rating agency requirements. This session is the final in the 5-part series designed for anyone seeking a deeper

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knowledge of servicer surveillance, including those new to their role, those seeking a refresher, or interested in pursuing their Commercial Mortgage Servicer (CCMS) Designation. Attendees of this track are eligible to be enrolled in the full CCMS Level 1 Certificate Program (\$550 value) at no additional cost to complete the rest of the Servicer Surveillance series, as well as the four remaining online self-study courses in the Level I certificate series before taking the final assessment (and earning 15 CCMS points).

Speakers

Gretel Braverman, *Senior Director, CMBS Surveillance, Kroll Bond Rating Agency*

Andrew Foster, *Director, CMBS Surveillance, Kroll Bond Rating Agency*

Insurance Pricing Market Trends

Location: Sheraton Ballroom II

3:30 PM - 4:30 PM

Insurance premiums continue to rise and coverages are harder to obtain and desired levels, this is making it cumbersome to ensure proper coverage. Join this session as industry peers discuss the impact this is having on the ability to close new loans, manage the insurance renewal process and service loans in this volatile market.

Speakers

Grisela Crespo, *Director of Commercial Real Estate Practice, Fortress Risk Consultants, LLC*

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

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

Irene Minderhoud, *Assistant Vice President, CBRE Capital Markets*

Servicing Compliance and the Need for Data Standardization

Location: Sheraton Ballroom III

3:30 PM - 4:30 PM

Join compliance monitoring and risk management professionals as they discuss the necessary changes in data standardization to properly

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measure and report compliance.

Speakers

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

Kathleen Olin, *Managing Director, Industry Initiatives, CRE Finance Council*

John Pomaranski, *MISMO Facilitator, MISMO*

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

Donna Teague, *CCMS, Director - CML Portfolio and Risk Management, Mutual of Omaha Insurance Company*

4:30 PM - 6:00 PM

mPower Event: Reignite Your Journey to Success

Location: Chicago Ballroom VI

In today's market, many people are experiencing burnout and stress and ask how they can be more effective, motivated, and happy daily. In this interactive talk, Bronwyn will share a new perspective to navigate the choppy waters of the present-day market and share the tools you need to reach your peak in your work and life with confidence and enthusiasm.

Speaker

Bronwyn Morrissey, *CMB, AMP, Enterprise Client Executive, Bronwyn Morrissey Coaching*

Friday, May 12, 2023

8:00 AM - 10:30 AM

Registration

Location: Chicago Promenade West

8:30 AM - 9:00 AM

Continental Breakfast

Location: Ballroom Promenade

9:00 AM - 10:30 AM

Leadership Tips for Servicers

Location: Chicago Ballroom VI

As organizations and industries mature, best practices and ways of working evolve. Panelists share personal and organizational practices

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that have helped them to lead. Hear tips and anecdotes about hybrid work, employee retention, and management strategy.

Speakers

Amy Frazey, CPA, *Assistant Vice President, Investment Administration, StanCorp Mortgage Investors, LLC*

Erika Haberlen, *Principal, Marketing Director, Partner Engineering and Science, Inc.*

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

Timothy E. Steward, *Director Commercial Mortgage Loans, Symetra Life Insurance Company*

Derek Wilmet, *Asset Management Team Lead, Colliers Mortgage*

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