



NRMLA 2015 Western Regional Meeting

CONFERENCE AGENDA

May 11-13 | Hyatt Regency Huntington Beach | Huntington Beach, CA

Monday, May 11

1:00 pm to 5:00 pm

Registration Desk Open

2:00 pm to 5:00 pm – *Driftwood Meeting Room*

**Financial Assessment Workshop:
Models for a New Market (2 CRMP Credits)** 

Host: • Steve Irwin, Executive Vice President, NRMLA, Washington, DC

Presenters: • Paul Fiore, American Advisors Group, Orange, CA
• Deborah Moran, Reverse Mortgage Funding LLC, Bloomfield, NJ
• Tracy Milligan, One Reverse Mortgage, San Diego, CA
• Phillip Caulfield, Housing Policy Specialist, U.S. Department of Housing and Urban Development, Philadelphia, PA

Tuesday, May 12

All sessions on Tuesday and Wednesday will be in Huntington Ballroom

8:00 am to 6:00 pm

Registration Desk Open

Exhibition Hours

8:00 am to 12:30 pm—OPEN

12:30 pm to 1:30 pm—CLOSED

1:30 pm to 6:00 pm—OPEN

9:00 am to 9:30 am

Welcome Session with NRMLA Leadership

Host: • Peter Bell, President & CEO, NRMLA, Washington, DC

Presenters: • Joe DeMarkey, Reverse Mortgage Funding LLC, Bloomfield, NJ

Tuesday, May 12

9:30 am to 10:15 am

The FA Effect: An Operations Executive, Retail/Wholesale Executives and Loan Originator Discuss Financial Assessment's Impacts

- Host:** • Megan Lawler, Bay Docs, Inc., Novato, CA
- Presenters:** • Elly Johnson, Reverse Mortgage Solutions, Inc., Hiram, GA
• Cheryl Chargin, American Advisors Group, Orange, CA
• Sherry Apanay, Urban Financial of America, Tulsa, OK
• Colleen Moore, Golden Equity Mortgage, San Diego, CA

10:15 am to 11:15 am

The Right Message: Marketing and Delivering the New HECM

- Host:** • Marty Bell, SVP, Marketing & Communications, NRMLA, Washington, DC
- Presenters:** • Mary Smith, Liberty Home Equity Solutions, Rancho Cordova, CA
• Teague McGrath, American Advisors Group, Orange, CA
• Sharon Robbins, Reverse Mortgage Solutions, Inc., Tucson, AZ

11:15 am to 11:30 am

Break

11:30 am to 12:30 pm

Understanding the Mechanics of Social Security and Its Impact On Your Clients' Retirement Planning (1 CRMP Credit)



- Host:** • Peter Bell, NRMLA, Washington, DC
- Presenter:** • Russell F. Settle, SocSec Analytics, LLC, Elkton, MD

12:30 pm to 1:30 pm – *Lighthouse Courtyard*
Networking Lunch

1:30 pm to 2:45 pm

Policy Evolution: HECM Update from FHA

- Host:** • Peter Bell, NRMLA, Washington, DC
- Presenters:** • Karin Hill, Senior Policy Advisor, U.S. Department of Housing and Urban Development, Washington, DC
• Erica Jessup, Housing Program Policy Specialist, U.S. Department of Housing and Urban Development, Washington, DC
• Phillip Caulfield, Housing Policy Specialist, U.S. Department of Housing and Urban Development, Philadelphia, PA

2:45 pm to 3:30 pm

Trends and Issues in Counseling (1 CRMP Credit) 

- Host:** • Adrian Prieto, Liberty Home Equity Solutions, Rancho Cordova, CA
- Presenters:** • Dan Grafius, ClearPoint Credit Counseling Solutions, Granada Hills, CA
• Melinda Opperman, Springboard Nonprofit Consumer Credit Management, Inc., Commerce, CA
• John Olmstead, Office of Housing Counseling, U.S. Department of Housing and Urban Development, Burlington, VT

3:30 pm to 3:45 pm

Break

3:45 pm to 4:30 pm

Setting Expectations: Issues in Loan Servicing (1 CRMP Credit) 

- Host:** • Richard Burke, BNY Mellon, Austin, TX
- Presenters:** • Michael Kressin, Nationstar, Irving, TX
• Ryan LaRose, Celink, Lansing, MI
• Leslie Flynn, Reverse Mortgage Solutions, Inc., Spring, TX

5:00 pm to 6:00 pm – *Huntington Terrace*

Networking Reception

Wednesday, May 13

8:00 am to 12:00 pm

Registration Desk Open


Exhibition Hours

8:00 am to 11:00am—OPEN

8:00 am to 9:00 am – *Huntington Foyer North*

Continental Breakfast

9:00 am to 10:00 am

Counsel's Briefing: An Update on NBS, Marketing/Advertising, Loan Officer Compensation, CFPB, State Legislation, and Other Regulatory Issues (1 CRMP Credit) 

- Presenter:** • Jim Brodsky and Jim Milano, Weiner Brodsky Kider, PC, Washington, DC

Wednesday, May 13

10:00 am to 10:15 am

Break

10:15 am to 12:00 noon

Sales Strategies and Techniques: What's Changed?

Host: • Kimberly Smith, American Advisors Group, Orange, CA

Presenter: • Tabatha Addison, American Advisors Group, Orange, CA

12:00 noon

Conference Adjourns