

2018 TRI-STATE MORTGAGE CONFERENCE



FEBRUARY 8-9, 2018
Portsmouth Harbor Events Center
Portsmouth, NH

MAINE
BANKERS
Association

NH Bankers
ASSOCIATION

Vermont Bankers Association

VBA



Maine
Association
of Mortgage
Professionals



MORTGAGE
BANKERS &
BROKERS
ASSOCIATION
OF NEW HAMPSHIRE, INC.



2018 TRI-STATE MORTGAGE CONFERENCE

FEBRUARY 8-9, 2018 | PORTSMOUTH HARBOR EVENTS CENTER, PORTSMOUTH, NH

PRELIMINARY

AGENDA

THURSDAY

FEBRUARY 8

8:15 AM - 9:00 AM

REGISTRATION & NETWORKING WITH EXHIBITORS/SPONSORS FULL BREAKFAST BUFFET

Early Bird Sponsors:

CATIC – *Thursday Buffet Luncheon*
Allied Solutions – *Friday Morning Breakfast*

Early Bird Exhibitors:

Atlantic Community Bankers Bank (ACBB)
Barristers Title & Closing Services
CATIC
Essent Guaranty
Flagstar Bank
Genworth
Kriss Law
Merrimack Mortgage Company
Property Valuation Services
United Wholesale Mortgage

9:00 AM - 9:05 AM

WELCOME

John Swenson, Chairman, NH Bankers Mortgage Committee
SVP-Bank Operations Officer, Bank of New Hampshire

Martha Cossey, President, MBBA-NH
Director Education/Business Development, Summit Title Services Corp

9:05 AM - 10:05 AM

ALL THINGS “E” ELECTRONIC SIGNATURE, NOTARY AND RECORDING

Michael Chodos, Senior Vice President and General Counsel
Notarize

Technology opens many industries, including financial services, real estate and legal, to faster turnaround times and increased productivity with reduced complexity and human error. Notarize is the nation’s leading digital end-to-end remote/online electronic notary platform. Learn how to make notarization of your most important documents more convenient, secure and accessible during this presentation.

10:05 AM - 10:45 AM

DAY ONE CERTAINTY

Speaker Invited
Freddie MAC

10:45 AM - 11:15 AM

MORNING BREAK

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AGENDA (CONTINUED)

THURSDAY

FEBRUARY 8

11:15 AM - 12:15 PM

DAY ONE CERTAINTY SUCCESS STORIES AND STEPS TO IMPLEMENTATION

Moderators:

Pamala Ordway, VP & Loan Operations Manager, St. Mary's Bank

Deb Ferrante, Account Manager - Certified Mortgage Professional, Essent Guaranty

Panelists:

Renee Pfender, VP of Product Development, Essent Guaranty

Speaker Invited, Birchwood Credit Services

Speaker Invited, CBCInnovis

Where are we now, how to get started, how to tie in vendor services, and success stories.

12:15 PM - 1:15 PM

LUNCH

Buffet Luncheon Sponsored by CATIC

1:15 PM - 2:15 PM

LINKEDIN STRATEGIES FOR LOAN OFFICERS

Zak Stoiber, Digital Marketing Specialist, MGIC

MGIC's expert digital marketing specialist will discuss social media, specifically how LinkedIn can help loan officers attract and retain customers, and set yourself up for success.

2:15 PM - 2:45 PM

AFTERNOON BREAK

2:45 PM - 4:00 PM

WIRE FRAUD/CYBERSECURITY: WHAT ARE WE DOING TO PROTECT OURSELVES & OUR CLIENTS?

Moderator: Gary A. Coffin, Director of Client Education

Market Street Settlement Group, LLC

Panelists:

Greg Korn, SVP Chief Risk Officer, Merrimack Mortgage Company, LLC

Patrick Hennessy, Detective, N.H. State Police and FBI Task Force Officer (Invited)

Wire fraud scams reported by title companies to the Internet Crime Complaint Center (IC3) increased 480% in 2016 according to a warning issued by the FBI. This session will provide an overview of the state of wire fraud in our region and the action victims need to take to prevent or minimize their loss. Panelists will also discuss what mortgage lenders, title companies and real estate agents are doing to protect themselves and their clients.

4:00 PM - 4:45 PM

MILLENNIAL ENGAGEMENT, ONCE YOU HAVE THEM, HOW TO KEEP THEM

Joshua Wolfe, Executive Director

Maine Association of Mortgage Professionals

During this session, Josh will provide ways to engage and communicate with millennials, the outreach he has done with the universities and how your company can appeal to them.

4:45 PM - 5:00 PM

ADJOURNMENT

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AGENDA (CONTINUED)

FRIDAY

FEBRUARY 9

8:15 AM - 9:00 AM

REGISTRATION & NETWORKING WITH EXHIBITORS/SPONSORS FULL BREAKFAST BUFFET

Buffet Breakfast Sponsored by **Allied Solutions**

Early Bird Sponsors:

CATIC – *Thursday Buffet Luncheon*

Allied Solutions – *Friday Morning Breakfast*

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HUD'S POLICY INITIATIVE'S, HUD FUNDS IN NEW HAMPSHIRE, AND WORK FORCE HOUSING

The Honorable Pamela Hughes Patenaude, Deputy Secretary
U.S. Department of Housing and Urban Development

Join us for our keynote address from Pamela Hughes Patenaude, who was nominated by President Trump and confirmed by the United States Senate as the Deputy Secretary of the U.S. Department of Housing and Urban Development on September 14, 2017. Ms. Patenaude brings to HUD more than 30 years of experience in the areas of housing, economic development, real estate, and public policy.

9:45 AM - 10:00 AM

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FRIDAY

FEBRUARY 9

10:00 AM - 11:15 AM

2018...A VIEW FROM WASHINGTON

Rod Alba, SVP, Mortgage Finance & Senior Regulatory Counsel
American Bankers Association (ABA)

With the leadership shakeup at the CFPB and the federal banking agencies, the regulatory environment relating to mortgage lending and consumer protection is changing. This presentation will discuss the changing regulatory environment in Washington, the impact it will have on bank supervision and enforcement, and the key issues and opportunities banks should be thinking about in 2018 and beyond. Always a highlight of the Mortgage Conference over the last several years, Rod will also be joined by the law firm of **Arnold & Porter**.

11:15 AM - 12:00 PM

VIOLATIONS & EXAM ISSUES

FDIC – **Brigid Blain**, Compliance Examiner

OCC – Invited, Title

FRBB – **Colleen S. Lynch**, Consumer Compliance Manager, Supervision, Regulation & Credit

Regulatory round table to learn about the top violations and exam issues.

12:00 PM

ADJOURNMENT

ACCOMMODATIONS

Accommodations will be at the Residence Inn Portsmouth Downtown/Waterfront, 100 Deer Street
Portsmouth NH 03801

Reservations must be made by **Wednesday, January 17, 2018** to receive the group rate of 139.00, plus 9% tax.

TO MAKE RESERVATIONS:

- Call 603-422-9200 and use Group Code: **TSBTSBA**
- Reserve online **HERE**