

MBA's **WHOLE
LOAN TRADING
WORKSHOP 2018**

NOV. 7-8 HOUSTON, TX



Wednesday, November 7, 2018

6:00 - 8:00 PM **NETWORKING RECEPTION** *Sponsored by*



Thursday, November 8, 2018

Panel Moderators: **Dan Fichtler**, Director, Housing Finance Policy, Mortgage Bankers Association
Mike Fratantoni, Chief Economist, Mortgage Bankers Association

8:30 - 9:00 AM Welcome and Introductions

Mike Fratantoni, Chief Economist, Mortgage Bankers Association

9:00 - 10:00 Incorporating Whole Loan Trading in Your Business Strategy

Tom McLemore, Senior Vice President, FTN Financial Capital Assets Corporation
Gary Watkins, Whole Loan Acquisition, First National Bank of America

10:00 - 11:00 Growth in Non-agency Executions

Mike Brenning, Chief Production Officer, Deephaven Mortgage

11:00 - 11:20 BREAK

11:20 - 12:15 What are Community Banks Looking for in Today's Market?

12:15 - 1:15 NETWORKING LUNCH *Sponsored by*



1:15 - 2:15 Market Color and Tips for Scratch and Dent, NPL, and RPL Loans

Brian Cerise, Vice President, Sales & Trading, Phoenix Capital, Inc.
Michael Kelleher, Vice President, MountainView Financial Solutions
Michael Lima, Managing Director-Whole Loan Trading, Mid America Mortgage, Inc.
Brendan Teeley, Senior Vice President, Whole Loan Sales, Trading, MIAC Analytics

2:15 - 2:30 BREAK

2:30 - 3:30 Trading Tips: Flow and Bulk Deals

Jim Glennon, Director, Secondary Services, Optimal Blue

3:30 - 4:30 Getting Deals Done: Legal, Tech, and Operational Considerations

Ruth Lee, Director of Mortgage Services, MetaSource LLC
Lauren Pryor, Partner, Mayer Brown LLP

4:30 - 4:45 Wrap-Up and Adjourn

General Workshop Sponsor:



Schedule and speakers are subject to change