

NRMLA 2007 WESTERN REGIONAL MEETING AGENDA

Wednesday February 21

9:00 a.m.–11:45a.m.

Getting Started in Reverse Mortgages : An intensive workshop designed to help those new to the reverse mortgage business become familiar with options for participating, major aspects of loan origination and organizational management considerations.

Speakers:

Montey Rose, Financial Freedom, Irvine, CA
Shawna James, MortgageIT, New York, N.Y.
Tom Scabareti, Wells Fargo Home Mortgage, Camarillo, CA

9:30 a.m.–10:30 a.m.

An Analytical Approach to Marketing: Understanding Data Availability & Analysis to Pinpoint Areas of Opportunity

10:30 a.m.–10:45 a.m.

Morning Break

10:45 a.m.–11:45 a.m.

Raising Capital to Expand Your Reverse Mortgage Operation

Speaker:

Michael J. Sekits, JAM Equity Partners, LLC, El Segundo, CA

12:00 a.m.–1:00 p.m.

Networking Luncheon

1:15 p.m. – 2:00 p.m.

Major Trends & Political Issues Impacting the Reverse Mortgage Business

Current State of The Market

Legislative & Regulatory Issues in 2007

Speakers:

Peter Bell, President, National Reverse Mortgage Lenders Association, Washington, D.C.
James Brodsky, Weiner, Brodsky, Sidman, Kider, PC. Washington, D.C.

2:00 p.m.– 2:45 p.m.

Beyond HECM: Product Review of Proprietary Reverse Mortgages

Sarah Hulbert, BNY Mortgage, Renton, WA
Pamala Henderson, Countrywide Bank, West Hills, CA
Phyllis Stephen, Generation Mortgage Company, Atlanta, GA
Bart Johnson, Financial Freedom, Irvine, CA.

2:45 p.m.– 3:00 p.m.

Afternoon Break

Exhibit Hours: Wednesday 2/21, 10 a.m.- 6:30 p.m.

Concurrent Sessions

3:00 p.m. – 4:00 p.m.

Hispanic Marketing: Reaching America's Fastest-Growing Demographic Group

Speaker:

Ingrid Otero Smart, President, Anita Santiago Advertising, Inc., Santa Monica, CA

Becoming an FHA-Approved Lender and Expanding Your Territorial Approval

Speakers:

Travis Pham, Chief, Processing and Underwriting Division, Santa Ana Home Ownership Center, U.S. Department of Housing and Urban Development, Santa Ana, CA

Sandy Smith, Senior Single Family Housing Specialist, Santa Ana Home Ownership Center, U.S. Department of Housing and Urban Development, Santa Ana, CA

4:00 p.m. – 5:00 p.m.

The More the Merrier: Options for Getting Information Out to Prospective Borrowers A look at websites, advertising and lead generation programs to help you increase your market potential.

Speakers:

Tom Scabareti, Wells Fargo Home Mortgage, Camarillo, CA
Sean Marsh, One Mortgage Network, Inc., San Diego, CA
Gretchen Williams, Reverse Mortgage Leads Network, Inc.

5:00 p.m. – 6:30 p.m.

Networking Reception



**Fairmont Newport Beach
February 21-22, 2007**

**Register online at
www.nrmlaonline.org**

NRMLA
National Reverse Mortgage Lenders Association

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Thursday February 22

8 – 9 a.m.

Continental Breakfast

Concurrent Sessions

8:30 – 9:30 a.m.

The HECM Loan Package: Understanding the Key Documents

Speakers:

Dan Mooney, Underwriter, Processing and Underwriting Division, Santa Ana Home Ownership Center, U.S. Department of Housing and Urban Development, Santa Ana, CA

Annette Spies, Underwriter, Processing and Underwriting Division, Santa Ana Home Ownership Center, U.S. Department of Housing and Urban Development, Santa Ana, CA

Participation by Brokers & Advisors in HECM Origination

Speaker:

James Milano, Weiner, Brodsky, Sidman, Kider, PC, Washington, D.C.

9:30 – 11 a.m.

“Town Meeting” with HUD Santa Ana Home Ownership Center Your opportunity to meet all of the key personnel responsible for HECM program management, monitoring and enforcement at the Santa Ana HOC – and get answers to your questions on FHA policy.

Speakers:

Joe Bates, Director, Santa Ana Home Ownership Center, U.S. Department of Housing and Urban Development, Santa Ana, CA

Danny Mendez, Director, Processing and Underwriting Division, Santa Ana Home Ownership Center, U.S. Department of Housing and Urban Development, Santa Ana, CA

Dan Mooney, Underwriter, Processing and Underwriting Division, Santa Ana Home Ownership Center, U.S. Department of Housing and Urban Development, Santa Ana, CA.

Concurrent Sessions

11:15 – 12 p.m.

Loan Originator Roundtable

Speaker:

TBA

Concurrent Sessions Continued

11:15 – 12 p.m.

Processor & Underwriter Roundtable

Speakers:

Annette Spies, Santa Ana Home Ownership Center, U.S. Department of Housing and Urban Development, Santa Ana, CA

Bobbi Borland, Appraiser, Processing and Underwriting Division, Santa Ana Home Ownership Center, U.S. Department of Housing and Urban Development, Santa Ana, CA

Dan Mooney, Underwriter, Processing and Underwriting Division, Santa Ana Home Ownership Center, U.S. Department of Housing and Urban Development, Santa Ana, CA

Elaine Eaton, Financial Freedom, Roseville, CA

12:00 p.m.

NRMLA Conference Adjourns

Thursday Afternoon February 22

National Aging in Place Council Meeting

12:30 p.m. - 1:45 p.m.

Aging in Place Luncheon Age Wave Trends: Recognizing the Opportunities and Preparing to Cater to the “Silver Tsunami” (Optional; separate registration required)

Speaker:

Mary Furlong, Mary Furlong & Associates, Lafayette, CA

1:45 p.m. – 2:45 p.m.

Honing Your Message: Persuading Seniors & Their Families to Pro-Actively Plan for Aging in Place

2:45 p.m. – 3:30 p.m.

Taking a Stand: Helping Protect Our Clients from Senior Fraud

3:30 p.m. -4:15 p.m.

Trends & Innovation in Home Modification

4:15 p.m.-5:00 p.m.

Networking Reception

Exhibit Hours: Thursday 2/22, 8 a.m.- 12:30 p.m.

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