



OriginatorConnect 2018



CONFERENCE GUIDE THURSDAY, AUGUST 23



**PRE-CONFERENCE
WORKSHOP**
OPEN TO ALL ATTENDEES
10:00 a.m. - 3:00 p.m.

SEPARATELY TICKETED
Free, but advance registration
required

BUILD-A-BROKER

Join us for a special day designed to help originators who want to open their own broker business, or for brokers who want to find better ways to run their company. This day is designed to show you the basics of setting up your business – from how to rent space, to what accounting programs are recommended – and will also cover topics including choosing your loan origination systems, how to pick a CRM system, and more. This pre-conference workshop is free, but seating is limited and pre-registration is required.

Sponsored By **Quicken Loans[®]**
Mortgage Services

10:00 a.m. – 11:00 a.m.



BROKERAGE 101

This roundtable discussion will focus on the foundation for establishing your business, including experienced mentors on:

- How to lease office space that will grow with you, but not break the bank
- Choosing an accounting program and payroll provider
- How to determine whether your workers are employees or independent contractors
- How to furnish your space on a budget
- What's the right corporate form (LLC v. Corp.) for you
- State Licensing Support

Melrose 3 & 4

11:00 a.m. – 12:00 p.m.

GETTING THE TECH ADVANTAGE

We're gathering a panel of technology providers to discuss innovative tech tools you can use to set your brokerage up for success.

Melrose 3 & 4

1:00 p.m. – 2:00 p.m.

ESTABLISH A COMPETITIVE ADVANTAGE WITH A VARIED PRODUCT LINEUP

Few brokerages can fully grow without offering more than the standard-vanilla residential home mortgage. We're bringing in product experts and broker practitioners to discuss a bevy of diverse products that you can add to your lineup as you create your broker shop.

Melrose 3 & 4

2:00 p.m. – 3:00 p.m.



BROKERAGE 102

This roundtable discussion will focus on additional foundational issues for establishing your business, including experienced mentors on:

- Policy and Procedures that a company should have - including BSA/AML, Sexual harassment,
- Marketing and Compliance - under RESPA, TILA, Reg. N, the CFPB, getting leads, co-marketing with Realtors etc.
- Compliance training, audit and testing

Presented by **Tyna-Minet Anderson** of Mortgage Educators & Compliance

Melrose 3 & 4

CONFERENCE GUIDE

FRIDAY, AUGUST 24



10:00 a.m. – 3:00 a.m.

SEPARATELY TICKETED

Free, but advance registration required

Mortgage Star: Leadership & Strategy For Professional Mortgage Women

The Mortgage Star Conference is pleased to present a compelling and inspirational program of events for women leading the profession. Our schedule runs throughout the day on Friday, August 24, at Planet Hollywood. This year's gathering serves as a pre-conference event for the Originator Connect show on August 24-26 at Planet Hollywood.

Mortgage Star Is Sponsored By



Sessions Include:

11:00 a.m. - 11:45 a.m.



BUILD YOUR FOUNDATION FOR SUSTAINABLE SUCCESS

How would you like to wake up each morning free from worry – confident that all the pieces are in place for your continued success? How would you like to create a business you love and find joy doing it? **Kelly Resendez** is Executive Vice President at Paramount Partners Group and author of *Foundation To Sustainable Success: A Conscious Guide To Mastering The Mortgage Business*. She provides the mindset, strategies, and concrete framework you need to increase your market share and build sustainable success.

12:15 p.m. – 1:00 p.m.



THE BOTTOM LINE ON USING NON-QM LOANS TO BOOST BUSINESS

Get the real scoop on how Non-QM loan products can make a real difference in increasing your pipeline by Carrington Mortgage Services, the experts when it comes to working the toughest loans. We'll explain some of the identifying factors for those who fit the Non-QM mold, how to work with them and what type of loan options are available in the marketplace for them, even for those who are self-employed. Hosted by industry veteran **Amy Marsh**, Business Development Manager for Carrington Wholesale Lending.

1:00 p.m. – 1:45 p.m.



FINDING YOUR INDUSTRY VOICE

Over the course of five years as Director of Marketing at RCN Capital, **Erica LaCentra** has been a pivotal force as the company grew its national market share to where it is now, one of the largest private lenders in the country. But coming into the business green, she had to learn what characteristics are necessary for women to be successful in such a male dominated industry.

Celebrity Ballroom 5

9:30 a.m. – 4:30 p.m.

SEPARATELY TICKETED

Free, but advance registration required

SUCCESS TRACK: GET YOUR LOS AND PROCESSORS TRAINED, FOCUSED AND READY TO TAKE PRODUCTION TO THE NEXT LEVEL

Here's a solution to one of the biggest problems in our industry: getting new originators and processors up to speed quickly, efficiently and comprehensively. When you're already busy meeting your origination goals, finding the time and resources to train is often difficult.

That's why Originator Connect has teamed up with United Wholesale Mortgage to bring UWM's innovative Success Track program to Planet Hollywood. This day-long immersive experience will give new mortgage professionals an in-depth crash course in what they need to know to jump start their careers, and to get them quickly adding to the production pipeline.

Melrose 3 & 4

Sponsored By



CONFERENCE GUIDE

FRIDAY, AUGUST 24

9:00 a.m. – 5:00 p.m.

SEPARATELY TICKETED
\$79, but advance registration
required



NMLS License Renewal Class

DAVID LUNA

President
Mortgage Educators and Compliance
Sunset 2

Sponsored By



3:00 p.m. - 4:00 p.m.



CONCURRENT SESSIONS

SYSTEMS FOR SUCCESS: BUILDING THE PERFECT WORKFLOW PROCESS & HIGH PERFORMANCE, HIGH CAPACITY TEAMS

You want your team to succeed, but for that to happen you need the right structure and processes in place so everyone can deliver their best. **Adam Batayeh**, President of Lodasoft, will help you apply this to the mortgage business as the best tips and tricks are revealed in leveraging people, process, and technology to create the perfect playbook for repeatable and sustainable business in an ever-changing market.

Celebrity Ballroom 5



THE WHOLE TALE OF WHOLESALE

There's a lot of discussion in the originator industry about wholesaler practices, benefits and questions. In this lively discussion, we'll take a look at the "whole tale of wholesale." Bring your questions, comments and concerns to this lively discussion, featuring **Allen Middleman**, senior vice president of wholesale at Freedom Mortgage.

Sunset 1

4:00 p.m. – 4:45 p.m.



CONCURRENT SESSIONS

THE NEXT LEVEL: SUCCESS SECRETS OF THE BEST MLOS IN AMERICA

Why is it so many loan officers get stuck at 4 or 5 loans a month even with decades of experience? Stuck in a seemingly never-ending feast or famine cycle doing 9 or 10 one month, followed by 1 or 2 the next. You spend one month filling the pipeline and then the next working ridiculous hours just getting those deals to the finish line. Find out all this and more by participating in this engaging, power-packed session provided by **Erik Janeczko**, National Sales Coach for Flanagan State Bank Mortgage.

Celebrity Ballroom 5



DO YOU REALLY NEED A WHOLESALE REP?

In a purchase market with rising rates and compressed margins, many lenders are responding by offering their brokers "AE-Lite," which may be cost efficient for the lender; but can the LO really afford to be in THIS market without a true lending partner? Hear from VP of Sales, **Jon Laolagi**, from The Money Source (TMS), speak on the value of a seasoned and knowledgeable Account Executive over "AE-Lite" and how to know the difference.

Sunset 1



DRIVING ADOPTION OF NEW TECHNOLOGY IN YOUR BUSY LENDING OPERATION

Mortgage lending teams are typically moving quickly - meeting with customers, building their networks, and ultimately trying to get loans to close as quickly and easily as possible. **Brandon Hoyles**, a former high-producing loan officer a current head of utilization at Blend, will lead a discussion on rolling out new technology and driving broad adoption throughout lending organizations. The session will touch on common obstacles to utilization, how to develop a solid and sustainable rollout strategy, and best practices for getting the team on board.

Wilshire Ballroom

CONFERENCE GUIDE

FRIDAY, AUGUST 24

5:30 p.m. – 8:00 p.m.

OPEN TO ALL ATTENDEES



Opening Reception and Celebration

Join us as we celebrate the origination community at this special networking reception open to all attendees. We'll have an opportunity for everyone to gather and get ready for a weekend like no other. And, in an special exciting appearance, we'll enjoy a special presentation from an act that electrified the stage of America's Got Talent and which will bring their unique spin on building teamwork to Originator Connect. In their brand new show, The Passing Zone asks...can **Jon Wee** and **Owen Morse** save the world through laughter and dangerous stunts? It can't hurt to try, so that's just what they're going to do!

The Passing Zone has been wowing audiences for decades with hilarious, award-winning performances. They have been finalists on America's Got Talent, they have performed at the White House, and they hold 4 Guinness World Records. Their combination of comedy, dexterity, danger, and hilarity has audiences on their feet all across the globe. The Passing Zone saves the world from boredom and the mundane by putting themselves at risk for your amusement!

UWM Main Stage

Sponsored By



homebot

SCHEDULE OF EVENTS

SATURDAY, AUGUST 25

9:30 a.m. - 10:15 a.m.

CONCURRENT SESSIONS

YOUNG MORTGAGE PROFESSIONALS: REFUELING THE INDUSTRY THROUGH ATTRACTING, CONNECTING AND EDUCATING MILLENNIALS

Mortgage companies on a growth path need to recognize the effects Millennials are having on their workforce. We'll discuss tactics on recruiting, educating and retaining Millennials. Join us to learn more about the changes your business may need to make in order to stay relevant in today's market.

Wilshire Ballroom

Sponsored By



FINTECH + YOUR BORROWERS: HOW TO ACQUIRE MORE LEADS, MORE LOANS, MORE CONFIDENTLY

Originators today know fintech drives competitiveness and relevancy among consumers. Digital Mortgage Strategist **Raj Parekh** reveals best- and next- practices of leading loan officers leveraging fintech to increase prospects, efficiencies, and production. Join us and leave with a digital tool you can implement today that your borrowers will love.

Celebrity Ballroom 5

BOOST YOUR BUSINESS WITH FIX & FLIP LOANS AND PRIVATE LENDING

With home flipping in the U.S. at a 10-year high, there has never been a better time to expand your product offerings. Private lending offers lucrative options for fix & flip deals and other real estate investing scenarios that don't fit traditional guidelines. In this session, **Jeffrey Tesch**, RCN Capital Managing Director & Private Lending Expert, will teach you how to:

- Identify profitable solutions for some of your most commonly overlooked leads
- Leverage fix & flip loans and other private lending products to make more money now
- Best present yourself and your borrower to a private lender

Melrose 3 & 4



CONFERENCE GUIDE

SATURDAY, AUGUST 25

10:30 a.m. – Noon



DAVID LYKKEN, STEVE RICHMAN & DAVID LUNA Mega Trends Transforming Your Business!

A Session So Big, We Needed THREE Major Speakers To Handle It!

For the first time ever on stage together, join these three top mortgage lending experts as they talk about the latest strategies that can powerfully transform your business. Get ready for an energy level that will threaten to blow the roof off!

UWM Main Stage

Sponsored By



Noon - 6:00 p.m.

Exhibit Hall Opens

1:30 p.m. - 2:15 p.m.



KEYNOTE PRESENTATION: MAT ISHBBIA MORTGAGE BROKERS – THE OBVIOUS CHOICE

Momentum is drastically shifting in the mortgage industry. Mortgage brokers are re-emerging as the best choice for consumers, loan originators and real estate agents. The huge spike in broker loan volume and the number of licensed mortgage brokers is expected to intensify, as the industry's biggest player is focused on giving brokers the tools, training and resources to gain market share and dominate their retail competition. Join UWM President/CEO **Mat Ishbia**, leader of the No. 1 wholesale lender in the nation, for a high-impact presentation on how mortgage brokers can continue to build off their current momentum to further differentiate themselves in their respective markets, appeal to a broader customer base, and build stronger partnerships with real estate professionals.

UWM Main Stage

2:45 p.m. - 3:30 p.m.

CONCURRENT SESSIONS



HAPPY BORROWERS: POWERING SATISFACTION THROUGH TECHNOLOGY

Your borrowers matter. And in a changing market, their satisfaction (and their agent's satisfaction) matters more than ever. In this session, you'll hear from **John Paasonen**, founder and CEO of Maxwell, the emerging leader of digital mortgage solutions for independent mortgage lenders, about how technology will increasingly play a critical role in exceeding expectations. How do you deliver great service without being disintermediated by technology? How can a digital experience deepen your borrower and agent relationships?

Celebrity Ballroom 5



PREPARE YOUR BUSINESS FOR THE FUTURE BY GETTING INTO REVERSE

Home Equity Conversion Mortgages (HECMs)—commonly known as reverse mortgages—are quickly becoming a necessary building block for retirement funding. If you're not yet offering reverse mortgages as part of your product mix, you're missing out on an important and rapidly growing market: You'll learn more about reverse mortgage products, and how our turnkey origination platforms make it easy to enter the reverse mortgage business and increase revenue. Presented by **Craig Barnes**, Education Leader, Reverse Mortgage Funding.

Wilshire Ballroom



ELEVATE YOUR CAREER WITH SALES SUPERSTAR TECHNIQUES

If you're serious about making a change, dedicating yourself with 100% effort, then get ready for a full immersion into changing your business. Today is all about adapting and surviving. Come to this session to learn the mental side of succeeding, awareness on what is changing, and how to add high octane to your media, marketing and lead gen. Learn from **Ben Anderson**, a superstar originator who has closed more than \$3 billion in his career, and is ranked in the top 15 originators in the nation. Point by point, you'll learn how to create a CEO mindset, and elevate your game!

Melrose 3 & 4

CONFERENCE GUIDE

SATURDAY, AUGUST 25

4:00 p.m. – 5:00 p.m.



AMANDA BEARD

Seven-time Olympic Medalist, Model, Entrepreneur
In The Water, They Can't See You Cry

Amanda Beard made her first Olympic swimming appearance in 1996 at the age of 14. Beard won one gold and two silver medals at that first Olympic Games and has been a strong competitor since. She went on to win a gold medal, two silvers and a bronze at the next two Olympic Games. Beard is the winner of eight national titles and is a former world record holder.

Amanda has also made her mark outside of the pool, becoming much more than the 14-year-old Olympic gold medalist that carried her teddy bear around wherever she went. In April 2012, Amanda released her first book, New York Times Best Seller "In The Water They Can't See You Cry," a riveting memoir revealing the truth behind the Olympic spotlight, the battles that she fought along the way and her new found happiness in love and motherhood. Touring coast to coast, Amanda stays busy talking about her book, hosting swim clinics, endorsing products, speaking at events and making appearances in top national media like the "Today Show," "Dr. Phil," "Access Hollywood," CNN, USA Today, FOX Sports and more.

UWM Main Stage

5:00 p.m. – 6:00 p.m.

Cocktails & Connections Reception
Drinks and networking on the Exhibit Floor.

Sponsored By **Flagstar[®]**
Bank

8:00 p.m. - 11:00 p.m.

THE SATURDAY NIGHT AFTER PARTY



YOU'RE INVITED! Join RCN Capital, Appraisal Nation, & Geraci LLP for:
A Shot in the Dark, *The Originator Connect After Party*
Saturday, August 25th, 8:00 p.m. - 11:00 p.m.

The fun doesn't have to stop just because Originator Connect has concluded for the night! Swing on by Topgolf at MGM Grand Hotel & Casino to enjoy complimentary drinks, small bites & networking time with attendees and exhibitors from Originator Connect.

It's going to be a great night for a drive, so we look forward to seeing you there!

CONFERENCE GUIDE

SUNDAY, AUGUST 26

9:00 a.m. – 11:00 a.m.

Exhibit Hall Open

BREAKFAST BEFORE BUSINESS
Continental Breakfast on the Exhibit Floor.

Sponsored By  **Revaluate**

9:30 a.m. – 10:30 a.m.



Sunday Morning Kickoff - MORTGAGE 2025

Just a little over 10 years ago, Steve Jobs and Apple introduced the iPhone, and the advent of smartphone technology has changed the financial world. In one short decade, that one piece of handheld tech has reshaped how the mortgage industry delivers its products and reaches consumers. So what will the next few years bring in terms of mortgage innovation? Join our panel of mortgage tech visionaries for a lively, provocative and compelling give-and-take on the Next Big Thing. Our panelists include UWM Chief Digital Officer **Justin Glass**, Revaluate CEO **Chris Drayer**, Freddie Mac Loan Product Advisor expert **Thomas Smith**, and **David Schroeder**, senior vice president at Quicken Loans.

UWM Main Stage

11:00 a.m. – Noon



AFTERBURNERS

Flawless Execution From America's Top Military Pilots

The Real Deal: How To Train Yourself To Achieve Your Goals, Exceed Your Expectations, And Ratchet Up Your Revenue. In 1989, Jim "Murph" Murphy sat at the controls of an F-15 fighter jet and realized that the cultural discipline and strategic alignment needed to execute flawlessly in the unforgiving, rapidly changing world of military aviation was more than unique — it was awe-inspiring. The U.S. military's ability to cultivate a singleness-of-mind around strategic action was so compelling to Murph that he strove to translate these time-tested, combat-proven processes into a simple, scalable, agile methodology. In 1996, Murph started Afterburner, Inc. to share the message of Flawless Execution with organizations around the world. Today, nearly 20 years later, more than 1.7 million professionals have experienced the power of Flawless Execution. Now we bring the Afterburner team to Originator Connect for a closing keynote event that you will be talking about for months!

UWM Main Stage

Noon

ORIGINATOR CONNECT ADJOURNS

Thank you to our sponsors and exhibitors.
We look forward to seeing everyone return in 2019!

PRODUCT SHOWCASES

FRIDAY, AUGUST 24th

5:00 - 5:20 p.m.

Sunset Room 1
Corevest

Sunset Room 2
Carrington Mortgage Wholesale

SATURDAY, AUGUST 25th

12:30 - 12:50 p.m.

Sunset Room 1
United Wholesale Mortgage

Sunset Room 2
Carrington Mortgage Wholesale

SUNDAY, AUGUST 26th

9:00 - 9:20 a.m.

Sunset Room 1
United Wholesale Mortgage

Sunset Room 2
Franklin American Mortgage

5:30 - 5:50 p.m.

Sunset Room 1
United Wholesale Mortgage

Sunset Room 2
Franklin American Mortgage

1:00 - 1:20 p.m.

Sunset Room 1
United Wholesale Mortgage

Sunset Room 2
Angel Oak Mortgage Solutions

10:30 - 10:50 a.m.

Sunset Room 1
The Money Source

Sunset Room 2
PRMG

PLANET HOLLYWOOD

PRESENTING SPONSOR

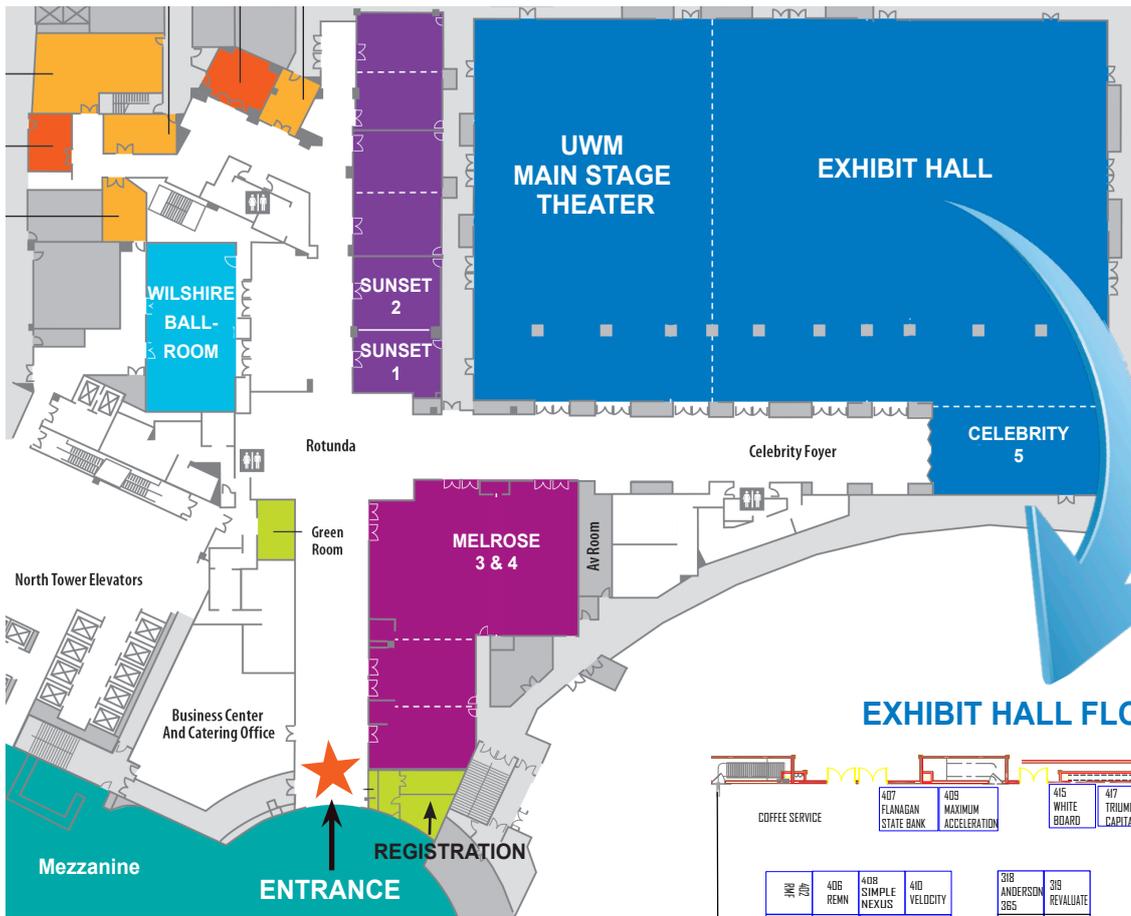


EXHIBIT HALL FLOOR PLAN



COMPANY

- AMERIHOME MORTGAGE
- ANGEL OAK
- APPRAISAL NATION
- APPRAISALTEK
- ARCH MI
- AVANTUS
- BEN ANDERSON 365
- BLEND
- BOMBOMB
- CALYX
- CAMBER MARKETING
- CARRINGTON
- CITADEL SERVICING
- CLOSING GIFTS
- COREVEST
- CUTCO
- EXPRESS COPY
- FLAGSTAR BANK
- FLANAGAN STATE BANK
- FRANKLIN AMERICAN
- FREEDOM MORTGAGE
- GERACI
- HIGH TECH LENDING
- HOMEBOT
- JCAP PRIVATE LENDING
- LENDWIZE
- LOANSCORECARD
- LODASOFT
- LUXURY MORTGAGE

BOOTH

- 424
- 212
- 404
- 222
- 322
- 330
- 318
- 225
- 125
- 322
- 207
- 320
- 315
- 80
- 120
- 30
- 50
- 317
- 407
- 111
- 216
- 127
- 420
- 306
- 420
- 419
- 307
- 224
- 450

COMPANY

- MAXIMUM ACCELERATION
- MAXWELL
- MONEYHOUSE
- MORTGAGE EDUCATORS
- MYSMARTBLOG, LLC
- NACSO
- PATCH OF LAND
- PLATINUM MORTGAGE
- PLAZA HOME MORTGAGE, INC.
- PODIUM
- PREMIER PROCESSING
- PRMG
- QUICKEN LOANS
- RCN CAPITAL
- REMN
- REVALUATE
- RMF
- ROYAL PACIFIC FUNDING
- SCHOOL OF LOC
- SECONDARY WIRE
- SHARESTATES
- SIMPLENEXUS
- TEMPLE VIEW CAPITAL
- THE MONEY SOURCE
- TRIUMPH CAPITAL
- UWM
- VELOCITY
- WHITEBOARD MTG CRM
- YMPA

BOOTH

- 326
- 214
- 223
- 113
- 304
- TBD
- 308
- 226
- 125
- 60
- 325
- 117
- 428
- 208
- 406
- 319
- 402
- 311
- 70
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- 332
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- 323
- 220
- 417
- 310
- 410
- 415
- 40

