

# Preliminary Roundtable Agenda

Monday, June 12, 2017

- 6:30 – 7:30 Cocktails & Networking – Hotel Teatro
- 7:30 – 9:30 Dinner – The Nickel Restaurant inside Hotel Teatro



Tuesday, June 13, 2017

Seawell Ballroom, Denver Center for the Performing Arts

- 7:00 – 8:00 Breakfast
- 8:00 – 8:15 **Opening remarks**  
Ken Richey, Managing Partner – Richey May & Co.
- 8:15 – 9:30 **Keynote and Q&A – State of the Industry**  
Dave Stevens, CEO & President - Mortgage Bankers Association
- 9:30 – 9:45 Break
- 9:45 – 11:15 **Roundtable discussions**
- 11:15 – 12:45 Lunch  
**“Technology Innovations in Financial Services: Embracing Disruption”**  
Dr. Chitra Dorai, IBM Fellow and Master Inventor, responsible for Cognitive Solutions and Services in IBM’s Global Business Services as its CTO. She has received numerous awards and recognition for her groundbreaking research and work in Banking and Financial Markets, with a particular focus on mortgage origination and servicing.
- 12:45 – 2:15 **Panel discussion and Q&A – Trends in Servicing**  
Panelists to include:
  - Seth Sprague, Phoenix Capital, Inc.
  - Mark Garland, MountainView Servicing Group
  - Tom Piercy, Incenter
  - Jared Frost, Richey May & Co.Moderated by Kurt Reisig, American Pacific Mortgage
- 2:15 – 2:30 Break
- 2:30 – 3:00 **Financial/operational metrics and benchmarking**  
Tyler House, Manager, Advisory Services - Richey May & Co.
- 3:00 – 4:00 **Roundtable discussions**
- 4:00 – 4:15 Closing remarks and final questions

\*This is a preliminary agenda, subject to change.