

2018 Roundtable Agenda

Monday, June 11



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

Tuesday, June 12

Seawell Ballroom, Denver Center for the Performing Arts

- 7:00 – 8:00 Breakfast
- 8:00 – 8:15 **Opening remarks**
Kalen Richey – Richey May & Co., LLP
- 8:15 – 9:30 **Keynote Panel and Q&A – State of the Industry**
Panelists to include:
- Bill Cosgrove - President & CEO, Union Home Mortgage
 - Jim Parrott – Founder, Falling Creek Advisors
 - Tim Rood – Chairman, The Collingwood Group
- Moderated by Pete Mills, SVP, Residential Policy and Member Services, Mortgage Bankers Association
- 9:30 – 9:45 Break
- 9:45 – 11:15 **Roundtable discussions**
- 11:15 – 12:45 Lunch – **Talent Acquisition and Retention**
Leah Brown, Crescendo Strategies
- 12:45 – 1:00 Break
- 1:00 – 1:15 **Financial/Operational Metrics and Benchmarking**
Tyler House, Manager, Advisory Services - Richey May & Co., LLP
- 1:15 – 2:45 **Panel discussion and Q&A – Pricing, Execution, & Cost Reduction Strategies**
Panelists to include:
- Mike Duncan – Managing Director, Compass Analytics, LLC
 - Frank Fiore – CEO, Matchbox, LLC
 - Ron Leonhardt - President & CEO, CrossCountry Mortgage, Inc.
 - Chrissi Rhea – President/CEO, Mortgage Investors Group
 - Jerry Schiano – CEO, Spring EQ, LLC
- Moderated by Ken Richey, Mortgage Banking Practice Leader, Richey May & Co., LLP
- 2:45 – 3:00 Break
- 3:00 – 4:00 **Roundtable discussions**
- 4:00 – 4:15 **Closing remarks and final questions**