




SBA Lending Technical Conference – Agenda
Rev It Up with NAGGL!
May 2-4, 2017

Tuesday, May 2			
6:30 am	Transportation in front of Hyatt to depart to Prairie View Golf Course		
8:30 am-2:30 pm		Golf Tournament – Prairie View Golf Club Sponsors: banc-serv / Newtek, GCF Valuation, Seacoast Commerce Bank, Tetra Tech	
7:00 – 8:30 pm	Opening Reception Cosmopolitan Ballroom 	Ready, Set, Go! Called the Crossroads of America, Indianapolis is a great city for sports! Visit the NCAA Hall of Champions, Indianapolis Motor Speedway, Victory Field baseball stadium and many other great attractions. Join attendees to network with friends and colleagues while enjoying delicious hors d'oeuvres and complimentary beer and wine. The reception will be held in the SBA Marketplace to take advantage of one-on-one interaction with exhibitors in a relaxed setting.	Premier Sponsor: banc-serv / Newtek Silver Sponsors: GCF Valuation LifeEase SBA Business Insurance Solutions Thomas USAF Group Plus: Bronze Sponsors
Wednesday, May 3			
7:30-8:30 am	Breakfast Cosmopolitan Ballroom	Breakfast with the Exhibitors Exhibit Hall Open 7:30-Noon; 1:00-4:30 pm	Sponsors: Evolve Bank & Trust FTN Financial PNC Bank Radius Bank
8:30-10:00 am	General Session Regency Ballroom	Conference Opening: The Future is Here Opening Remarks – Tony Wilkinson, NAGGL CEO  Keynote Address The Honorable Linda McMahon Administrator, US Small Business Administration What's New in the Office of Capital Access Bill Manger, Associate Administrator + Team	Sponsor: ReadyCap Lending
10:00-10:30 am	Refreshment Break Cosmopolitan Ballroom	Visit the SBA Marketplace! Play the Exhibitor Game ... WIN PRIZES!	Sponsor: Signature Securities
CONCURRENT SESSIONS 10:30-11:45 am			

10:30-11:45 am	Regency E/F Also Thurs 10:15 am	“Wicked Hard” Policy Issues	<ul style="list-style-type: none"> • Dianna Seaborn (SBA) • Cecilia Mitchell (Zions Bancorporation)
	Network Also Thurs 1:30 pm	Preparing for Your PARRIS Review & Understanding Common Review Findings	<ul style="list-style-type: none"> • Linda Rusche (SBA) • Kelley Groth (Banner Bank)
	Studio One (3 rd Fl)	Interactive Discussion: Why & When to Use the 504 Secondary Market	<ul style="list-style-type: none"> • Howard Anderson (Zions NRE) • Colin Carter (Zions NRE) • Matt Hunt (AVANA Capital) • Ken Rosenthal (CDC Capital Markets)
	Discovery (3 rd Fl) Also Wed 1:15 pm	Meeting the Prudent Liquidation Deadline— And More!	<ul style="list-style-type: none"> • Vanessa Piccioni (SBA) • Ashley Horner (Summit Bank) • John Moshier (ReadyCap Lending)
Noon-1:00 pm	Regency Ballroom 	Luncheon Borrower Success Story Karey Sims-Crone of I-70 Wrecker Service & Garage (Camby, Indiana)	Sponsors: BBVA Compass JPMorgan Chase Bank Live Oak Bank US Bank
CONCURRENT SESSIONS 1:15-2:30 PM			
1:15-2:30 pm	Regency E/F	Interactive Discussion: The Latest from the 7(a) Secondary Market	<ul style="list-style-type: none"> • John Wade (SBA) • Bob Judge (Government Loan Solutions) - facilitator • JP Bennett (Signature Securities) • Craig Cline (FTN Financial) • Jennifer Coltharp (Hanover Securities) • Andy Saslawsky (SunTrust Robinson Humphrey) • Christopher Anthony (BNY/Colson Services)
	Network Also Thurs 10:15 am	Legal Risks Faced by Lenders	<ul style="list-style-type: none"> • Nick Jellum (Anastasi Jellum) • Kimberly Rayer (Starfield & Smith)
	Studio One (3 rd Fl) Also Thurs 1:30 pm	Peer-to-Peer Discussion: Portfolio Monitoring Best Practices	<ul style="list-style-type: none"> • Tom Dent (PNC Bank) • Diane Gallion (Radius Bank) • Michele Vervlied (Customers Bank)
	Discovery (3 rd Fl) Also Wed 10:30 am	Meeting the Prudent Liquidation Deadline— And More!	<ul style="list-style-type: none"> • Vanessa Piccioni (SBA) • Ashley Horner (Summit Bank) • John Moshier (ReadyCap Lending)
2:30-3:00 pm	Refreshment Break Cosmopolitan Ballroom	Visit the SBA Marketplace! <i>Get your exhibitor card stamped – you might win one of the great prizes to be awarded Thursday</i>	Sponsor: Nationwide Valuations
CONCURRENT SESSIONS 3:00-4:15 PM			
3:00-4:15 pm	Regency E/F Also Thurs 1:30 pm	SBA One: What’s New, What’s Coming	<ul style="list-style-type: none"> • Stephen Kucharski (SBA) • Genevieve Sansom (BNY Mellon – Colson)
	Network Also Thurs 1:30 pm Discovery (3 rd Floor)	Handling Common Servicing Actions	<ul style="list-style-type: none"> • Michael Shepherd (JPMorgan) • Rachel Zippwald (NAGGL)
	Studio One (3 rd Fl) Also Thurs 10:15 am	Preserve Your Guaranty: Don’t Make <i>These</i> Mistakes	<ul style="list-style-type: none"> • Vanessa Piccioni (SBA) • Roxann Burns (Crossroads Small Business Solutions)
	Discovery (3 rd Fl) Also Thurs 10:15 am	Using the Lender Portal: A Great Tool!	<ul style="list-style-type: none"> • Shareen Kitterman (D&B) • Adrianna Rockford (D&B) • Julie Huston (Claymont Financial) • Kendra Vincenty (Florida Capital Bank)
COMMITTEE MEETINGS 4:15-5:30 PM			

4:15-5:30 pm	Concept (2 nd Floor)	Technical Issues Committee	
	Theory AB (2 nd Floor)	Secondary Market Committee	
	Studio 1 (3 rd Floor)	Small Lender Committee (East & West)	
	Studio 3 (3 rd Floor)	504 Lending Committee	
	Studio 2 (3 rd Floor)	Associate Member Committee	
	Vision (3 rd Floor)	Large Lender & Public Policy Committees	
	Discovery (3 rd Floor)	Non-Bank Lender Committee	
6:30-9:00 pm Transportation departs hotel at 6:15 pm	The Crane Bay Event Center	 <p>The race is on! Start your engines and get ready to rock and roll! NAGGL attendees and guests will be fueling up at the fabulous Crane Bay, a contemporary urban event venue. Whether you join the pit crew, sit in the cockpit or dance to the high-performance music of the Endless Summer Band, you are part of the Winners Circle. The NAGGL garage will be ignited with great food and drinks for the home stretch.</p>	<p>Premier Sponsor: banc-serv / Newtek</p> <p>Gold Sponsor: Seacoast Commerce Bank</p> <p>Silver Sponsor: Raymond James & Associates The Bailey Group</p> <p>Plus: Bronze Sponsors</p>
Thursday, May 4			
7:30-8:30 am	Cosmopolitan Ballroom	<p>Breakfast with the Exhibitors \$500 Drawing @ 8 am <u>Must be Present to Win!</u></p> <p>Exhibit Hall Open 7:30-11:30 am; 1:00-3:00 pm</p>	<p>Sponsors: American Business Lending Morgan Stanley</p>
8:30-9:45 am	General Session Regency Ballroom	<p>NAGGL Government Relations News</p> <p>Larry Conley (JPMorgan Chase; Chairman, NAGGL) Tony Wilkinson (NAGGL) Kristen Granchelli (NAGGL)</p>	<p>Sponsor: Wells Fargo SBA Lending</p> <p>Grand Prize Winner Announced <u>Must be Present to Win!</u></p>
9:45-10:15 am	Refreshment Break Cosmopolitan Ballroom	<p>Visit the SBA Marketplace! Door Prize Winners Announced</p>	<p>Sponsor: Lewis Kappes</p>
CONCURRENT SESSIONS 10:15 - 11:30			
10:15-11:30 am	Regency E/F Also Wed 10:30 am	"Wicked Hard" Policy Issues	<ul style="list-style-type: none"> • Dianna Seaborn (SBA) • Cecilia Mitchell (Zions Bancorporation)
	Network Also Wed 1:15 pm	Legal Risks Faced by Lenders	<ul style="list-style-type: none"> • Nick Jellum (Anastasi Jellum) • Kimberly Rayer (Starfield & Smith)
	Studio One (3 rd Fl) Also Wed 3:00 pm	Preserve Your Guaranty: Don't Make <i>These</i> Mistakes	<ul style="list-style-type: none"> • Vanessa Piccioni (SBA) • Roxann Burns (Crossroads Small Business Solutions)
	Discovery (3 rd Fl) Also Wed 3:00 pm	Using the Lender Portal: A Great Tool!	<ul style="list-style-type: none"> • Shareen Kitterman (D&B) • Adrianna Rockford (D&B) • Julie Huston (Claymont Financial) • Kendra Vincenty (Florida Capital Bank)

11:30 am-1:15 pm	Luncheon Regency Ballroom	Legislative Luncheon Guests from Senate Committee on Small Business & Entrepreneurship: Renee Bender, Kevin Wheeler Guest from House Committee on Small Business: Justin Pelletier	Sponsor: Zions Bank 
CONCURRENT SESSIONS 1:30 - 2:45 PM			
1:30-2:45 pm	Regency E/F Also Wed 3:00 pm	SBA One: What's New, What's Coming	<ul style="list-style-type: none"> • Stephen Kucharski (SBA) • Genevieve Sansom (BNY Mellon – Colson))
	Network Also Wed 10:30 am	Preparing for Your PARRiS Review & Understanding Common Review Findings	<ul style="list-style-type: none"> • Linda Rusche (SBA) • Kelley Groth (Banner Bank)
	Studio One (3rd Fl) Also Wed 1:15 pm	Peer-to-Peer Discussion: Portfolio Monitoring Best Practices	<ul style="list-style-type: none"> • Tom Dent (PNC Bank) • Diane Gallion (Radius Bank) • Michele Vervlied (Customers Bank)
	Discovery (3rd Fl) Also Wed 3:00 pm Network	Handling Common Servicing Actions	<ul style="list-style-type: none"> • Michael Shepherd (JPMorgan) • Rachel Zippwald (NAGGL)
2:45 – 3:00 pm	Refreshment Break SHORT BREAK!	Visit the SBA Marketplace! Don't Miss the Door Prize Drawings!	
Conference Wrap-Up Roundtable 3:00 – 4:15 pm			
3:00-4:15 pm	Regency E/F	Closing Roundtable: Give Input on the 'Wickedest Hard' 50 10 Issues	<ul style="list-style-type: none"> • Jane Butler (NAGGL), Facilitator • Dianna Seaborn (SBA) • Cece Mitchell (Zions; TIC Chairwoman) • Lynn Ozer (Fulton Bank)

Thanks to all our great sponsors for their support and assistance in helping NAGGL keep costs down for all conference attendees!

