



# PEER BUSINESS ROUNDTABLES

## MORTGAGE BANKERS ASSOCIATION COMMERCIAL/MULTIFAMILY REAL ESTATE FINANCE

### FINANCIAL OFFICER ROUNDTABLE

Washington, D.C.  
April 19 and 20, 2017

#### Wednesday, April 19, 1:00 – 6:30 p.m.

- 1:00 p.m. – 1:15 p.m. Welcome, Introductions, and Review of Antitrust Guidelines
- 1:15 p.m. – 2:15 p.m. CRE Mortgage Market Update, Outlook and Discussion  
Jamie Woodwell, Vice President for Research & Economics, MBA
- 2:15 p.m. – 3:00 p.m. MSR Accounting Update and Discussion  
Dan Thomas, Managing Director, MIAC  
George Christo, Executive Vice President, Prestwick (*invited*)
- 3:00 p.m. – 3:15 p.m. BREAK
- 3:15 p.m. – 3:45 p.m. Washington Update  
Bill Killmer, Senior Vice President for Legislative and Political Affairs, MBA
- 3:45 p.m. – 4:30 p.m. Secondary Market Update  
Josh Seiff, Vice President, Multifamily Capital Markets & Trading, Fannie Mae  
Rob Koontz, Vice President, Multifamily Securitization, Freddie Mac  
Tim Groves, Citi (*invited*)
- 4:30 p.m. – 5:00 p.m. Open Discussion
- 5:00 p.m. – 6:30 p.m. NETWORKING RECEPTION

**Thursday, April 20, 8:00 a.m. – Noon**

8:00 a.m. – 8:30 a.m. BREAKFAST

8:30 a.m. – 9:15 a.m. Accounting Update  
Steve Robertson, Principal, PWC  
TBD, PwC

9:15 a.m. – 9:45 a.m. Changing Regulatory Environment  
Tom Kim, Senior Vice President of Commercial/Multifamily, MBA

9:45 a.m. – 10:45 a.m. Open Discussion/Speaker

10:45 a.m. – 11:00 a.m. BREAK

11:00 a.m. – 11:30 a.m. Budgeting for Technology

11:30 a.m. – 12:15 p.m. Open Discussion

- Tax Reform
- Risk ratings
- New HMDA reporting
- Budgets & staffing
- Other
- Planning for Accounting & Financial Management Conference
- Group/MBA activities that would help

**12:15 p.m. – 1:15 p.m. FOLLOW-ON FOR PARTICIPANTS IN MBA MSR ASSUMPTIONS SURVEY (Lunch will be served)**