



CMA Fall Conference

September 11-13, 2024 | Balboa Bay Resort, Newport Beach



KEYNOTE SPEAKER
David Luna
Industry Expert

SESSIONS

Broker Roundtables

Attorney Town Hall

Legislative Update

Networking

Register Online at www.CaliforniaMortgageAssociation.com

GENERAL INFORMATION

LOCATION:

The CMA Fall Conference will be held September 11-13, 2024 at the Balboa Bay Resort, located at 1221 West Coast Highway, Newport Beach, CA 92663. For room reservations, call the hotel at (949) 645-5000. Ask for the "CMA 2024 Fall Conference" rate. (Room rate is \$299 + \$20 resort fee per night Single/Double) through August 9, 2024 or until sold out.

CONFERENCE FEES:

Full registration includes seminar events, materials, cocktail/networking receptions and Thursday lunch.

	Registration received on or before August 29, 2024	Registration received from August 30, 2024 to date of seminar
CMA Member	\$495	\$595
Additional Attendee Same Company	\$395	\$495
Non-Member	\$695	\$795
Guest for Wednesday Night Mixer	\$ 50	\$ 50
Registration Total	\$ _____	\$ _____
PAC Raffle Tickets (voluntary; \$20 or more)	\$ _____	\$ _____
TOTAL ENCLOSED	\$ _____	\$ _____

REFUND POLICY:

Cancellations received in writing on or before August 29, 2024 will receive a credit toward a future conference. Cancellations received in writing on or after August 29, 2024 will not receive a credit or refund.

CMA DISCLAIMER STATEMENT:

Views, statements, information, and materials provided at CMA conferences do not necessarily reflect the views of the California Mortgage Association, its Officers, Directors, or Members. When considering any document, opinion, publication, or other material obtained from CMA or from any CMA event, attendees and recipients of the information are advised to seek qualified counsel as to the suitability of that material or information for their own business operation or use.

PHOTO/VIDEO DISCLAIMER:

By registering for and attending this conference, you agree that your image may be taken during the conference and used at any time, without further notification, for printed materials, websites, social media and other marketing purposes.

MISCELLANEOUS:

Please wear name badges to all functions. Tickets are required for various events. Please be courteous of others and place cell phones on silent mode. Program and speakers are subject to change without notice.

MCLE INFORMATION:

This activity is approved for Minimum Continuing Legal Education Credit by the State Bar of California in the amount of 4.5 hours. The CMA certifies that this activity conforms to the standards for approved education activities prescribed by the MCLE Rules of the State Bar of California.



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Wednesday, September 11, 2024

1:00 pm – 3:30 pm

1ST Annual Pickleball Tournament

Join us for an exciting Pickleball Tournament to support the CMA PAC! Whether you're a seasoned player or a beginner, this event promises fun and friendly competition for all. Enjoy an afternoon of pickleball, camaraderie, and community spirit while contributing to a great cause. All proceeds will benefit the CMA PAC, helping to advance important initiatives and support advocacy efforts. *Separate fee and registration.*

5:30 pm – 8:00 pm

Wednesday Night Network Mixer

Join your colleagues on the Bayfront Lawn at the Balboa Bay Resort for cocktails and appetizers on Wednesday evening. Enjoy beautiful Newport Beach, catch up with your peers and start networking early!



Thursday, September 12, 2024

7:30 am – 8:30 am

Continental Breakfast

7:30 am – 5:00 pm

Seminar Registration

8:00 am – 10:00 am

Exhibitor Set-up

10:00 am – 6:00 pm

Exhibitor Fair Open

8:30 am – 10:00 am

Broker/Lender Roundtables

MODERATED BY Pam Sosa, President, Standard Mortgage Financial Services, Inc.

Who has the answer, the idea, that one strategy for the next step in your business? How do you find out “who knows what?” and get help the help you need? It’s called, “CMA Broker/Lender Roundtables.”

Experienced/smart CMA members at each table lead a discussion on a selected topic. But that’s not all! You can get just as good – and sometimes better – ideas from other colleagues at the same table.

And the networking value! Meet someone new and be doing business together the following week. This session provides tens of thousands of dollars’ worth of knowledge. How much are you willing to “leave on the table?”

10:00 am – 10:30 am

Networking Break

10:30 am – 12:00 pm

Fund Manager State of the Union (1.5 General MCLE Credit)

MODERATED BY Brock Vandenberg, President, TaliMar Financial | Shafiq Taymuree, Executive Vice President, Stonecrest

The California Mortgage Association is excited to host the annual “Fund Manager State of the Union” session where we bring in industry experts to discuss various elements of the mortgage fund industry. We will cover a variety of topics such as key performance indicators of mortgage funds, updates from our legal experts, and how private loans are being priced nationally. This session is open to (and beneficial to) **all** CMA members and is an excellent opportunity for professionals in the private lending industry to stay informed and engaged with peers. Be prepared to share insights and ask questions because this session is interactive.

12:00 pm – 1:30 pm

Luncheon

Thursday, September 12, 2024

1:30 pm – 3:00 pm

Market Forecast

KEYNOTE SPEAKER David Luna, Industry Expert

Do you know where interest rates might be headed? We sure don't, but David Luna may. Known as one of the most important thought leaders in the mortgage industry, David Luna has been sought after by news media and professional organizations for his insight into what affects real estate markets, and why. Expect his keynote to touch on inflation, the Fed, interest rates, housing inventory, and local and national mortgage trends. David has spent his career in mortgage education and compliance, and he has held executive positions for banks, credit unions, mortgage bankers and brokerages. A truly engaging speaker, David has spent a lifetime paying attention to what is going on in the economy, and how it affects the mortgage industry. He'll share it all with you.



3:00 pm – 3:30 pm

Networking Break

3:30 pm – 5:00 pm

Building Your Company – How to Drive Profits

MODERATED BY Glenn Goldan, Founder & CEO, ReProp Financial

We have all seen presentations on "growing your company" which tend to be personnel driven. This discussion will be focused on your profits whether you want to remain a one-man band or grow an orchestra. We will focus on growth, but growth that maximizes your company's net profit potential regardless of size. Join Glenn Goldan, CEO of ReProp Financial who will host a panel of guests with companies, small and large, for a raw, honest discussion on the successes and pitfalls they have encountered.

5:00 pm – 6:30 pm

Cocktail Reception

Friday, September 13, 2024

7:30 am – 8:30 am

Continental Breakfast in Exhibitor Area

7:30 am – 12:00 pm

Registration

7:30 am – 12:00 pm

Exhibitor Fair Open

8:30 am – 10:00 am

What's New with ADU? (1.5 General MCLE Credit)

MODERATED BY Sandy MacDougall, President, Mortgage Vintage, Inc. | Marcus Carter, President, La Mesa Fund Control & Escrow, Inc. | Dennis Doss, Esq., Founder, Doss Law | John Lloyd, President, Fidelis Private Fund | Kathryn Moorer, Esq., Senior Associate, Wright Finlay & Zak, LLP

What's New with ADU's? This expert panel will provide important updates on new legislation, construction best practices, and lending guidance in the exploding Accessory Dwelling Unit (ADU) industry. The presenters will look at comprehensive aspects of development, construction, and lending in the ADU environment from a lending, funds control and legal perspective. Whether first or second, Owner Occ. or Non-Owner Occ., SFR or Duplex, or One lot or Two lots, you will learn and get practical guidance on what can be done legally while staying in compliance.

10:00 am – 10:30 am

Networking Break

10:30 am – 12:00 pm

Attorney Town Hall and Legislative Update

Mike Belote, Esq., CMA Legislative Advocate, California Advocates, Inc. | Robert Finlay, Esq., CMA Legal Counsel, Wright Finlay & Zak, LLP | Brad Rogerson, Esq., CMA Securities Counsel, Hanson Bridgett, LLP

Stay up to date with the legal and legislative activities that affect our businesses and our bottom lines. Brought to you by Michael Belote, CMA's legislative advocate, and Robert Finlay, CMA's legal counsel, this program will cover all the new legislation and case law that you need to know. Don't just cover your head and cry! Staying informed is the best way to protect your private lending business.



Not a CMA member yet?
Why not?
YOU NEED TO JOIN!

