

MBA's
**HUMAN RESOURCES
VIRTUAL SYMPOSIUM**
SEPT. 8-9, 2021



AGENDA

Time and Login:

September 8-9; 1:00 – 4:30 p.m. ET. Login instructions will be sent prior to the symposium

DAY 1: Wednesday, September 8; 1:00 – 4:30 p.m. ET

1:00 PM

Welcome and Symposium Overview

Co-Chairs, MBA's Human Resources Professional Networking Group:

Dee Grosso, EVP, Human Resources, Roundpoint

Brandi Jaber, EVP & President Residential Mortgage Division, First Home Bank

1:15 – 1:30 PM

Getting Started: Group Polling

Robert Northway, Partner, McLagan

Marina Walsh, Vice President, Industry Analysis, MBA

1:30 – 2:30 PM

COVID-Related and Return-to-Work Legal Questions

Russell Bruch, Partner, Morgan, Lewis & Bockius LLP

Meredith S. Dante, Partner, Ballard Spahr

William Kooper, Vice President of State Government Affairs and Industry Relations, MBA

- What COVID-related legal questions are being most asked by clients?
- Specific areas of return-to-work that could be problematic.
 - Employee refusal to return-to-work for health reasons
 - Mandatory vaccinations or healthy reporting; employee privacy
 - Accounting for travel time in compensation
 - Business travel
- Specific areas of remote or hybrid work that could be problematic.
 - Licensing implications
 - State taxation and jurisdiction issues
 - Cost reimbursements
- Mitigating legal risk during the post-pandemic work transition.

2:30 – 3:00 PM

Break

Schedule and speakers subject to change.

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3:00 – 3:30 PM

COVID-Related and Return-to-Work – Office Hours

Russell Bruch, Partner, Morgan, Lewis & Bockius LLP

Meredith S. Dante, Partner, Ballard Spahr

Bring your questions to this 30-minute Q&A session with our legal experts.

3:30 PM – 4:30 PM

Mortgage-Specific and Other Legal Issues

Justin Wiseman, Associate Vice President, Managing Regulatory Counsel, MBA (moderator)

Jed Mayk, Partner, Hudson Cook

Rich Andreano, Partner, Ballard Spahr

Meredith S. Dante, Partner, Ballard Spahr

- Refresher on the LO Compensation Rule and Interpretation
 - Scenarios and most current risks
 - Has the LO comp rule changed?
 - More on what's allowable, what's not, and what's still grey
 - How the LO compensation rule ties with fair lending rules. Should we expect more enforcement, given changing CFPB administration?
- Key Concepts and Developments regarding the Fair Labor Standards Act (FLSA)
 - Available exemptions and their requirements
 - Tracking and accounting for compensable time
 - Calculating overtime pay for loan officers and other mortgage employees
 - Treatment of part-time workers
 - What's new at the Department of Labor?
- Independent Contractor Classification
- Pay Equity Analyses

4:30 PM

Adjourn

DAY 2: Thursday, September 9; 1:00 – 4:30 p.m. ET

1:00 PM

Welcome Back

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1:00 – 1:45 PM

Diversity, Equity & Inclusion – Facilitated Discussion Breakouts

David Booth, Real Estate Employee Experience Business Advisor, USAA

Charmaine Brown, Director, Diversity, Equity and Inclusion, MBA

Tamara King, Vice President of Residential Policy and Member Engagement, Residential Policy, MBA

Brian Woody White, SVP, Chief Diversity & Inclusion Officer, HomeBridge Financial Services, Inc.

- During this breakout discussion, we will divide up into two groups for a discussion based on these questions:
 - How did you measure the impact of diversity, equity and inclusion efforts during the pandemic? Going forward?
 - What are some of the equitable considerations for returning to the office? How are these considerations being addressed?

1:45 – 2:30 PM

Benefits

Mark Friedman, Partner, AON

- Industry benefit trends gleaned from over 150 financial services organizations.
- What benefit areas or benefit features have seen the most change over the past few years?
- What is the current prevalence data related to high deductible health care plans and other medical plan features?
- What are the current trends in 401(k) plan design?
- What is typical industry practice related to parental and other leave benefits?

2:30 – 3:00 PM

Break

3:00 – 3:45 PM

Annual Mortgage Banking Compensation Survey Results

Robert Northway, Partner, McLagan -AON

Adrienne Sund, Associate Partner, McLagan - AON

- Highlights on what's changed in latest survey
- Survey and polling results for key sales and fulfillment, servicing and executive management positions
- Pay and performance analyses

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3:45 – 4:30 PM

Economic and Mortgage Market Outlook

Joel Kan, Associate Vice President of Economic and Industry Forecasting, MBA

Marina Walsh, Vice President of Industry Analysis, MBA

- Employment, GDP, the federal funds rate, consumer prices and other economic indicators affecting the mortgage industry
- Volume and rate forecast
- Loan performance and delinquency trending
- Industry profitability and mortgage company performance – revenues, expenses, and productivity

4:30 PM

Wrap-Up

MBA's HR Symposium 2021 will meet up to **6 PDC credits** if participant attends all sessions.



Mortgage Bankers Association is recognized by SHRM to offer Professional Development Credits (PDCs) for the SHRM-CP® or SHRM-SCP®.