

# SALT LAKE CITY WORKSHOPS MARCH 4-5<sup>TH</sup>



For questions related to training or registration, please contact us by email at [AmericaWest@eventfullyyourz.com](mailto:AmericaWest@eventfullyyourz.com) or by phone at 844.887.6477 and our event team will be happy to help.

## WEDNESDAY, MARCH 4<sup>TH</sup>

2:00-4:30 pm	Description
<p><b>Everything you Need to Know about SBA Compliance &amp; Staying within the White Lines – A Strategy for SBA Lending</b></p> <p><i>This optional pre-conference training can be added for just \$49. Registration closes February 28<sup>th</sup> or until the class fills. <a href="#">Email us to add this class to your registration</a></i></p>	<p>Understanding SBA OCRM Oversight, New Regulations, PARRiS/SMART Review Focus and Risk Management for SBA Loan Program Performance.</p> <p>Learn what you need to know about SBA Oversight Reform Act of 2018, Other Recent Final Rules, Increased OCRM Supervision, New Lender Enforcement Powers, Lender Review Protocol and OCRM Focus for 2020. We will discuss Corrective Action Response and Plans, Understanding Key PARRiS &amp; SMART Metrics, Portal &amp; Data Pack, as well as Lender SBA Risk and Strategic Business Planning.</p> <p>This training class is conducted by Brent Ciurlino, Senior Vice President – Risk &amp; Operations of Newtek, and former SBA Director of Credit Risk Management (OCRM) and Assistant Associate Administrator for SBA District &amp; Field Operations.</p>

## THURSDAY, MARCH 5<sup>TH</sup>

All workshops below are included with the cost of your training registration.

10:30-11:45 am	Workshops (see Workshop packet for descriptions)
<p><b>Closing Due Diligence &amp; Documentation</b></p> <p>Facilitated by:  <b>Nick Jellum, Anastasi Jellum, PA</b>  <b>McKenna Weiks, CORPSMART</b>  <b>Jody Niko, Celtic Bank</b>  <b>John Gygi, U.S. SBA</b>  <b>Goldie M. Olson, Mountain West S.B.F.</b></p>	<p>Documenting and closing SBA loans can leave you banging your head against the wall and frazzled. Come join our presenters from all aspects of the closing process and learn how to make this task less cumbersome and frustrating. They will answer your questions and go over best practices, including tips and tricks for making the closing easier.</p> <p><u>Who should attend:</u> Closers, Underwriters, Managers, Servicing Staff</p>
<p><b>Creating Processes that Improve Customer Service and Manage Expectations</b></p> <p>Facilitated by:  <b>Kimberly Holley, Mountain West S.B.F.</b></p>	<p>Navigating the commercial lending process can be daunting, especially for an inexperienced borrower. Managing expectations while providing high customer service can be a tightwire act, especially if you do not have process in place that will help you get to the finish line. This session will dive into setting up those processes that will alleviate hiccups and delays during the loan process.</p> <p><u>Who should attend:</u> Managers, Loan Officers, BDOs, Assistants, Underwriters</p>

1:00-2:30 pm	Workshops (see Workshop packet for descriptions)
<p><b>Building a Sustainable Loan Program</b></p> <p>Facilitated by:  <b>Chuck Evans, Capital Growth Solutions</b>  <b>Charlie Meyers, Centerstone Bank</b>  <b>Spencer Davis, Mountain West S.B.F.</b>  <b>Brian Bare, Zions First National Bank</b></p>	<p>Only close a few SBA loans a year? Want to know how to make participating in SBA lending profitable and sustainable? Our presenters will give you the tips and tricks to make your loan program successful. This is geared towards smaller banks, credit unions, and non-bank SBA lenders.</p> <p><u>Who should attend:</u> Managers, BDOs</p>
<p><b>Pre-Screening Deals for Underwriters</b></p> <p>Facilitated by:  <b>Ryan Hutchins, Peak Business Valuations</b>  <b>Darren Mize, GCF Valuation</b>  <b>Kimberly Holley, Mountain West S.B.F.</b>  <b>Mike Oliver, Mountain West S.B.F.</b></p>	<p>Lenders need to understand the basics of business valuation to avoid screenouts and allow applications to progress smoothly and seamlessly. In this training, we will walk through case studies to better screen deals and prepare a more robust internal valuation process. We will also touch on underwriting hot topics and best practices during loan underwriting.</p> <p><u>Who should attend:</u> Underwriters, Loan Officers, Managers</p>

