



FLAGGL 2019: Conference Agenda

September 18-20, 2019
 JW Marriott Orlando, Grande Lakes

Conference Presenting Sponsor:



Tuesday, September 17, 2019

8:30 am – 5:00 pm	Cordova 2	NAGGL Training Class “SBA Loan Servicing & Liquidation” – Day 1 , Instructor Jane Butler <i>This is an optional class for an additional fee through www.NAGGL.org. Pre-registration is required.</i>
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Wednesday, September 18, 2019

8:30 am – 5:00 pm	Cordova 2	NAGGL Training Class “SBA Loan Servicing & Liquidation” – Day 2 , Instructor Jane Butler <i>This is an optional class for an additional fee through www.NAGGL.org. Pre-registration is required.</i>
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2:00 pm to 5:00 pm	Cordova 3	Pre-Conference Training Workshops 2:00-2:50pm <i>Credit Memorandum Requirements, Instructor: Ray Chiamulera</i> 3:00-3:50pm <i>The SBA...Loans and a Whole Lot More, Instructors: Jonel Hein, Mary Hernandez</i> 4:00-4:50pm <i>Credit Analysis, Instructor: Ray Chiamulera</i>
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2:00 pm to 5:00 pm	Palazzo Foyer/Exhibit Hall	Exhibitor Check-In and Setup Attendee Check-In Welcome Reception
2:00 pm to 7:00 pm	Palazzo Foyer	
5:30 pm to 7:00 pm	Palazzo Exhibit Hall	

Welcome Reception Sponsored by:





Thursday, September 19, 2019

7:30 am to 8:30 am	Palazzo Exhibit Hall	Breakfast with Exhibitors
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Welcome Breakfast Sponsored by:



8:30 am to 10:00 am	Palazzo General Session	<p>Welcome Session</p> <p><i>Welcome Remarks – Victor Diaz, Starfield & Smith, PC</i></p> <p><i>Annual Meeting of the Members – FLAGGL Executive Board</i></p> <p><i>Sponsor Welcome Remarks – Michael W. Myhre, Florida SBDC Network</i></p> <p><i>Update from the Office of the Administrator</i></p> <ul style="list-style-type: none"> • John Miller, Deputy Associate Administrator, US SBA Office of Capital Access • Dianna Seaborn, 7(a) Program Director, US SBA Office of Financial Assistance • Susan Streich, SBA Office of Credit Risk Management 	<p>Session Sponsored by:</p> 
10:00 am to 10:15 am	Palazzo Exhibit Hall	<p>Networking Break with Exhibitors</p>	
10:15 am to 11:00 am	Palazzo General Session	<p>Industry Updates</p> <p><i>Update from the Office of the SBA Regional Administrator – Victoria Guerrero, So. FL District Director</i></p> <p><i>Updates from the Local SBA Office – Gil Colon, No. FL Interim Deputy District Director</i></p> <p><i>Update from the Office of International Trade – David Glaccum, Associate Administrator, OIT</i></p>	
11:15 am to 12:15 pm	<p>Mediterranean 1</p> <p>Mediterranean 2</p> <p>Mediterranean 3</p>	<p>Breakout Sessions</p> <p>Management Track</p> <ul style="list-style-type: none"> • <i>Who's in your foursome</i> - Pick the right people to make your SBA lending program successful • <i>Pick the correct club</i> - Select which processes are the best fit for your lender • <i>What's your strategy for playing the course</i> - Develop a plan for your team <p><i>Tim Terry, SBA Advisors (Moderator); Tom Pretty, TD Bank; Debbie Petrell, FFCFC; Mark Bryant, CenterState; Tony Zara, Newtek</i></p> <p>Loan Officer Track</p> <ul style="list-style-type: none"> • <i>Who's in your foursome</i> - Pick the right people to enable you to increase your SOI and, in turn, your leads and deals • <i>Pick the correct club</i> - Pick the correct organizations to join and the best places to invest your time and capital • <i>What's your strategy for playing the course</i> - Make sure you understand your lender's lending policies and the marketplace <p><i>Sanjay Bhaskar, StreetShares (Moderator); Ray Drew, Ready Cap; Don DiMartini, CitiBank; Bill Habermeyer, FBDC; Liudmila Esquerdo, US Century Bank</i></p> <p>Operations & Closing Track</p> <ul style="list-style-type: none"> • <i>Making it to the 19th hole</i> - Ensure that the loan is closed correctly and in compliance with lender and SBA policies and rules 	

	Del Lago 1-2	<ul style="list-style-type: none"> • <i>Turning in your scorecard</i> - Document fully your loan decisions and loan closing performance to ensure, as applicable, that (a) your SBA Guaranty is intact, (b) the debenture will fund timely and (c) your audit will go flawlessly. <p><i>Kristen Dickey, Starfield & Smith, PC (Moderator); Jackie Bogdan, BankUnited; Rebecca Robinson, FBDC; Margaret Guzinski, IDS</i></p> <p>General Track</p> <p><i>Messages from the Groundskeeper, the Starter, and the Course Ranger – A moderated panel (re: large real-estate loans, leaseholds)</i></p> <ul style="list-style-type: none"> • <i>Understanding Insurance</i> • <i>Appraisal Topics</i> • <i>Environmental Concerns and Solutions and Construction Topics</i> <p><i>Brooke Mirenda (Moderator); Joey Bonin, Partner Engineering & Science; Rob Ludicke, LandScience; Steve Mize, GCF Valuation; Paul Rosen, Platinum Peak Advisors</i></p>
12:30 pm to 1:45 pm	Palazzo General Session	<p>Keynote Luncheon</p> <p>Darryl Ross, former Fox5 News Reporter turned motivational speaker and trainer speaks about motivating employees and helping organizations improve their Leadership, employee engagement, and customer experiences.</p> <div data-bbox="1157 553 2018 695" style="border: 1px solid black; padding: 5px;"> <p>Keynote Luncheon Sponsored by:</p>  </div>
2:00 pm to 3:00 pm	Mediterranean 1 Mediterranean 2	<p>Breakout Sessions</p> <p>Management Track</p> <ul style="list-style-type: none"> • <i>Who's in your foursome</i> - Pick the right people to make your SBA lending program successful • <i>Pick the correct club</i> - Select which processes are the best fit for your lender • <i>What's your strategy for playing the course</i> - Develop a plan for your team <p><i>Mike DiNapoli, Florida DEO (Moderator); Mark Bryant, CenterState; Marty Ferguson, First Business Bank; Tony Zara, Newtek; Debbie Petrell, FFCFC</i></p> <p>Loan Officer Track</p> <ul style="list-style-type: none"> • <i>Who's in your foursome</i> - Pick the right people to enable you to increase your SOI and, in turn, your leads and deals • <i>Pick the correct club</i> - Pick the correct organizations to join and the best places to invest your time and capital • <i>What's your strategy for playing the course</i> - Make sure you understand your lender's lending policies and the marketplace <p><i>Bruce Boddie, (Moderator); John Hanrahan, FFCFC; Lynne Singletary, BankUnited; Ken Rosenthal, CDC Capital Markets</i></p>

Mediterranean 3

Operations & Closing Track

- *Making it to the 19th hole* - Ensure that the loan is closed correctly and in compliance with lender and SBA policies and rules
- *Turning in your scorecard* - Document fully your loan decisions and loan closing performance to ensure, as applicable, that (a) your SBA Guaranty is intact, (b) the debenture will fund timely and (c) your audit will go flawlessly.

Mitchell Fogel, Fogel Law Group (Moderator); Stacy MacLure, Seacoast Bank; Mike Tabachnick, Fogel Law Group; Darcie Norman, FFCFC; Jackie Bogdan, BankUnited

Del Lago 1-2

General Track

Messages from the Groundskeeper, the Starter, and the Course Ranger – A moderated panel (re: large real-estate loans, leaseholds)

- *Understanding Insurance*
- *Appraisal Topics*
- *Environmental Concerns and Solutions and Construction Topics*

Tom Wallace, IDS, Inc. (Moderator); Joey Bonin, Partner Engineering & Science, Inc.; Dan Halos, The Bailey Group; Brandy Lipps, Logic Environmental, Inc.; Larry Sage, The Sage Group

3:00 pm to 3:30 pm

Palazzo Exhibit Hall

Networking Break with Exhibitors

3:30 pm to 4:30 pm

Palazzo General Session

The New SOP: Dianna Seaborn, 7(a) Program Director, US SBA Office of Financial Assistance

5:30 pm to 5:45 pm

Buses Depart for TopGolf

TopGolf Networking Reception

6:00 pm to 8:30 pm

TopGolf Reception

[TopGolf Orlando](#) Buses will depart the JW between 5:30-5:45 pm, with reception beginning at 6pm. Enjoy food, drinks, networking and of course some golf from the comfort of our private bays. Don't miss the fun and prizes! Pre-purchase required – purchase yours [HERE](#).

8:30pm to 8:45 pm

Buses Depart for Hotel

Reception Sponsored by:



TOPGOLF

Friday, September 20, 2019

8:00 am to 9:00 am

Palazzo Exhibit Hall

Breakfast Buffet with Exhibitors

Breakfast Sponsored by:



9:00 am to 10:20 am

Palazzo General Session

Closing General Session I

Closing Session Sponsored by:



Sponsor Recognition

Update from Trade Associations

- **Tony Wilkinson**, President & CEO, NAGGL
- **Barbara Vohryzek**, President & CEO, NADCO
- **Michael W. Myhre**, CEO, Florida SBDC Network

10:30 am to 12:00 pm

Palazzo General Session

Closing General Session II: *Hot Topics from the Office of Credit Management (OCRM)*

Susan Streich, US Small Business Administration, Director, Office of Credit Risk Management

Prize Giveaways (Must be present to win!)