

NOVEMBER 13-14, 2018
DELAFIELD, WISCONSIN



FIRST ANNUAL

MORTGAGE BOOTCAMP



Designed for those who work in the mortgage industry, this new one-and-a-half-day seminar will walk you through the mortgage loan cycle and everything you need to know to be a stronger mortgage professional. **This intense workshop will give you advanced knowledge of each step of the mortgage process and provide you with opportunities to learn from seasoned experts.**

DAY ONE:

★ TAKING A STRONG APPLICATION

Regulations, documentation needs, setting expectations for the process and how to effectively interview a borrower.

★ PROCESSING FOR SUCCESS: *Develop great relationships and close more loans*

Review best practices for communication both internally and externally through the loan process and review the typical personality type differences between operations and sales.

★ UNDERSTANDING SECONDARY MARKET

Understanding the "Big Picture": Who are the players in the industry, how do they relate to one another, how is a mortgage funded and where do the rules come from?

★ **UNDERWRITING: *Who are the people behind the approval curtain?*** A review of how an underwriter looks at a loan and what factors are included. Credit, income, appraisal and title review.

★ MORTGAGE INSURANCE BASICS: *Getting the coverage you need to get the approval you want*

Coverage options and how mortgage insurance works. Explore the claims process and some delinquency scenarios where MI made the difference.

★ Q&A NETWORKING SESSION WITH PRESENTERS AND SEASONED PROFESSIONALS

DAY TWO:

★ MORTGAGE LENDING COMPLIANCE

An overview of the top mortgage regulations you need to know as a mortgage lender.

★ BUSINESS DEVELOPMENT PLANNING: *Grow Your Business*

A guided process to plan your sales activities for the next year. Walk away with a plan you can use daily.

WHO SHOULD ATTEND?

This program is designed for mortgage professionals of all levels of experience who would like to increase knowledge of the business and grow sales potential.

ENLIST TODAY!

Register online at: www.wimba.org
(see Events tab)
or fill out form on other side.

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★ AGENDA

Day One – Tuesday, November 13

- 8:30 a.m. Registration and Continental Breakfast
- 9:00 a.m. Program
- Noon Lunch
- 12:30 p.m. Program resumes
- 4:15 p.m. Optional Networking Session

Day Two – Wednesday, November 14

- 8:00 a.m. Continental Breakfast
- 8:30 a.m. Program
- Noon Adjourn

★ REGISTRATION INFORMATION

Registration includes handout materials, continental breakfasts, breaks and lunch on day one.

| | Advance | After Nov. 2nd |
|-------------|---------|----------------|
| WMBA Member | \$150 | \$170 |
| Non-Member | \$300 | \$340 |

Refunds less \$20 will be made if requested one week prior to seminar date. Substitutions allowed at any time.

Mail this form with payment to:

Wisconsin Mortgage Bankers Association

PO Box 1606, Madison, WI 53701

Phone: 608-255-4180 Fax: 608-268-8636

★ REGISTER

Company: _____

Address: _____ City: _____ State: _____ Zip: _____

Attendee Name: _____ Email: _____

Attendee Name: _____ Email: _____

Attendee Name: _____ Email: _____

Or Register online at www.wimba.org

★ SEMINAR LOCATION & HOTEL INFORMATION

November 13th & 14th, 2018

Delafield Brew Haus

3832 Hillside Drive
Delafield, WI 53018
www.delafield-brewhaus.com
(262) 646-7821

HOTEL INFORMATION

Holiday Inn Express Shoppes at Nagawaukee II, LLC

3030 Golf Road
Delafield, WI 53018
(262) 646-7077

Hilton Garden Inn Oconomowoc

1443 Pabst Farms Circle
Oconomowoc, WI 53066
(262) 200-2222

Please call area hotels directly for room reservations.

QUESTIONS?

Contact Patti Katzban
414-944-0672 or pkatzban@crosscheckcompliance.com with any questions.

ATTIRE

Please feel free to dress business casual. To ensure your comfort, we suggest you bring a light jacket or sweater.

SPECIAL NEEDS

If you have a disability that may affect your participation in this event, please forward a statement regarding any special needs to wmba@morgandata.com. We will contact you to discuss accommodations.