

2020

Lenders & Chief Credit Officers

CONFERENCE

WEDNESDAY, NOVEMBER 4

9:00 AM – 10:15 AM

Opening Keynote — Pivot Point: Thriving in a Post-COVID World

Shawn Rhodes, CEO, Shoshin Consulting

10:30 AM – 11:30 AM

LEARNING SESSION 1

Valuing Properties in a COVID World

David Rosenthal, President & CEO,
Curtis-Rosenthal, Inc.

LEARNING SESSION 2

How To Convert PPP Customers Into Full Banking Relationships

Ray Adler, Founder/CEO,
BTI Growth Advisors

11:30 AM – 1:00 PM

Lunch & Marketplace Time

1:00 PM – 2:00 PM

LEARNING SESSION 1

Competing for Commercial Loans -Winning with Swaps

Ben Lewis, Managing Director,
Chatham Financial

LEARNING SESSION 2

Applying AI to Monitor Borrower Performance and Portfolio Risk in Real Time

Gord Baizley, CEO, Judi AI

2:15 PM – 3:30 PM

General Session — Economic Update

Dr. Peter Rupert, Professor of Economics, University of California, Santa Barbara

4:00 PM – 5:00 PM

Virtual Happy Hour with a performance by Ryan Hiller

THURSDAY, NOVEMBER 5

8:00 AM – 9:00 AM

Breakfast & Marketplace Time

9:00 AM – 10:00 AM

General Session — The 21 Core Sales Competencies: Your Path to Growth

Mark Trinkle, Chief Growth Officer, Anthony Cole Training Group

10:15 AM – 11:15 AM

LEARNING SESSION 1

Platform Creep: Getting the Right Foundation

Scott Fieber, VP of Strategic Solutions, Cook Security Group

LEARNING SESSION 2

Commercial and Small Business Lending, Today and Post-COVID

James Wu, Founder & CEO, MonJa

11:30 AM – 1:00 PM

Lunch & Marketplace Time

1:00 PM – 2:00 PM

LEARNING SESSION 1

How to Lend Over the Business Cycle and Through the Pandemic

Dev Strischek, Principal, Devon Risk, Advisory Group, LLC

LEARNING SESSION 2

SureBuild Project Completion Insurance: Proactive Insurance in the Event of Borrower Default

Joe Derhake, CEO, Partner Engineering and Science, Inc.

Jenny Redlin, Principal, Partner Engineering and Science, Inc.

Chelsy White, Managing Director, Saint Vincent, LLC

2:15 PM – 3:15 PM

Peer Exchange Sessions

3:30 PM – 4:30 PM

LEARNING SESSION 1

Creating a Digital Lending Experience for your Employees and Commercial Customers

David Catalano, SVP, Business Development, Baker Hill

LEARNING SESSION 2

Handling Problem Loans in the Age of COVID-19

Gary Tokumori, Shareholder

Kenneth Miller, Shareholder

Parker Milliken

FRIDAY, NOVEMBER 6

8:00 AM – 9:00 AM

Breakfast & Marketplace Time

9:00 AM – 10:00 AM

General Session: Legislative Update

Kevin Gould, SVP Government Relations, California Bankers Association

Melanie Cuevas, VP Government Relations, California Bankers Association

Jason Lane, VP, Deputy Director Government Relations, California Bankers Association

10:15 AM – 11:15 AM

LEARNING SESSION 1

Lending to the Cannabis Industry

Terry Neeley, Founder & Managing Director, West Coast AML Services, LLV

Richard P. Ormond, Esq., Shareholder, Buchalter

Dante Tosetti, Chief Credit Officer, Beacon Business Bank

LEARNING SESSION 2

Data Collection Informing Construction Loan Risks

Jim Fraser, Director, CRE Strategy, Built Technologies

11:30 AM – 12:45 PM

General Session — The Future of Real Estate

Moderated by David Rosenthal, President & CEO, Curtis-Rosenthal, Inc.

Panelists:

Matthew May, Founder, May Realty Advisors

Eric Sackler, Director, Coldwell Banker Commercial

Lee Segal, President, Segal Commercial

Jon Dishell, Chief Capital Officer, Gemini Rosemont