



FLAGGL 2017: Conference Agenda

September 13-15th

JW Marriott Orlando Grande Lakes

Tuesday, September 12, 2017

8:30 am to 5:00 pm	Del Lago 3	NAGGL Training Class (Day 1): <i>Fundamentals of SBA Credit Underwriting</i> This is an optional training for an additional fee for those pre-registered. Uses case studies to walk-through credit underwriting 'the SBA way' and explore ratio analysis, analyzing projections, determining repayment ability, preparing the credit memo, and more. SBA now mandates debt service coverage ratios and the agency's focus on lenders' underwriting practices remains strong. Learn the potential pitfalls that can put your SBA guaranty at risk.
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Wednesday, September 13, 2017

8:30 am to 5:00 pm	Del Lago 3	NAGGL Training Class (Day 2): <i>Fundamentals of SBA Credit Underwriting</i> This is an optional training for an additional fee for those pre-registered. Uses case studies to walk-through credit underwriting 'the SBA way' and explore ratio analysis, analyzing projections, determining repayment ability, preparing the credit memo, and more. SBA now mandates debt service coverage ratios and the agency's focus on lenders' underwriting practices remains strong. Learn the potential pitfalls that can put your SBA guaranty at risk.
11:00 am – 3:30 pm	Ritz-Carlton Golf Club	Golf Tournament Golf tournament is \$135 per player. Shotgun start at 11:00 am. Includes cart, range balls, lunch and 2 drink vouchers. Advance registration required by August 14th. To request your foursome, email FLAGGL@eventfullyyourz.com .
2:00 pm to 5:00 pm	Mediterranean 6-8 Foyer	Exhibitor Check-In and Setup
2:00 pm to 6:00 pm	Mediterranean 6-8 Foyer	Attendee Check-In
5:30 pm to 7:00 pm	Coquina North Hall	Welcome Reception Join us for a welcome reception with our Exhibitors. Be sure to check in first at our registration desk to grab your badge and bag to collect goodies from our exhibitors.

7:30 am to 8:30 am	Coquina North Hall	Breakfast Buffet & Networking Exhibits will be open during breakfast. Limited seating is available in our exhibit area with more available in the accompanying general session space.
8:30 am to 9:00 am	Coquina South Hall	Conference Kick-Off & Welcome Hear from the Florida districts about the current state of SBA in the State of Florida and join us in recognizing the state and district small business people of the year. <i>Southern District, Francisco Marrero (Jonel Hein)</i> <i>State & District Small Business Person of the Year Award – Paul Morrow, South Dade Air Conditioning & Refrigeration</i> <i>Northern District, Wilfredo Gonzalez (Gil Colon)</i> <i>State & District Small Business Person of the Year Award – Gabriel Ruiz, Advanced IT Concepts, Inc.</i>
9:00 am to 10:15 am	Coquina South Hall	General Session: Update from the Office of the Administrator Hear from various speakers in the office of the Administrator. <i>William Manger, Associate Administrator</i> <i>Dianna Seaborn, Director OFA</i> <i>Andrea Giles, Director Office of Credit Risk Management</i> <i>Susan Streich, Director Office of Financial Program Operations</i>
10:15 am to 10:45 am	Coquina North Hall	Morning Break & Networking
10:50 am to 11:50 am	Rooms TBD	Breakout Sessions <i>Management Track: “Critical Success Factors to Growth”</i> <i>Hakim Kassam, Jeff Nager, Rich Bradshaw</i> <i>Loan Officer/BDO Track: “How to Improve Sales Productivity”</i> <i>Scott Radway, Ken Rosenthal, Ray Drew</i> <i>Loan Operations Track: “Data Breaches and Cybersecurity”</i> <i>Matt Froning</i>
12:00 pm to 1:30 pm	Coquina South Hall	Keynote Luncheon: Jerry Ross Join us for lunch and hear from Executive Director of the National Entrepreneur Center, Jerry Ross.

1:30 pm to 2:30 pm	Rooms TBD	Breakout Sessions <i>Management Track: “Tough Policy Issues/New SOP”</i> Dianna Seaborn, Director OFA <i>Loan Officer/BDO Track: “Common Review Findings – PARRIS Metrics”</i> Andrea Giles, Director OCRM <i>Loan Operations Track: “Common Reasons for Screen-outs”</i> Annette May, Acting Deputy Director LGPC
2:30 pm to 2:50 pm	Coquina North Hall	Afternoon Break & Networking
2:50 pm to 3:50 pm	Rooms TBD	Breakout Sessions <i>Management Track: “7(a) and 504 Origination Center Performance”</i> Susan Streich, Director Office of Financial Program Operations <i>Loan Officer/BDO Track: “Storytelling – It’s all in the Presentation”</i> Brooke Marks, Mitch Fogel <i>Loan Operations Track: “Submitting Loans for Standard Processing”</i> Annette May, Acting Deputy Director LGPC
4:00 pm to 5:00 pm	Rooms TBD	Breakout Sessions <i>Management Track: “Recruiting and Retaining your Sales Force”</i> Chuck Evans, Tim Terry <i>Loan Officer/BDO Track: “Structuring and Underwriting Difficult Loans”</i> Ray Chiamulera, Sandra Anderson <i>Loan Operations Track: “New and Scary Fraud Trends”</i> Michael Rothman, Esq.
6:30 pm to 8:30 pm	Coquina South Hall	Peace, Love & FLAGGL Dinner & Party Dinner and drink tickets included (cash bar also available). Get Ready for a "Peace"ful time on Thursday evening as we celebrate the 70s in style...Get those clogs and hot pants out from the attic because it's time to boogie! All your favorite records will be spinning, and the only thing we'll be protesting is the night ending. Costume prizes will be awarded to best dressed 70s person or characters (and we love group themes) so start planning now!

Friday, September 15, 2017

8:00 am to 9:00 am	Coquina North Hall	Breakfast Buffet & Networking Exhibits will be open during breakfast. Limited seating is available in our exhibit area with more available in the accompanying general session space.
9:00 am to 9:10 am	Coquina South Hall	General Session: SBA's 7(a) Community Advantage Pilot Loan Update <i>Manuel Hidalgo, Director, Office of Economic Opportunity</i>
9:10 am to 10:15 am	Coquina South Hall	General Session: Update from Trade Associations <i>Barbara A. Vohryzek, NADCO</i> <i>Tony Wilkinson, NAGGL</i> <i>Tee Rowe, SBDC</i>
10:15 am to 10:45 am	Coquina South Hall	Annual Meeting of the Members & Sponsor Recognition
10:45 am to 11:45 am	Coquina South Hall	General Session: Concluding Remarks & Open Questions Possible topics may include policy changes, affiliation and franchise issues, lender oversight, credit elsewhere, and the new SOP. <i>William Manger, Associate Administrator</i> <i>Dianna Seaborn, Director OFA</i> <i>Linda Rusche, Director Office of Credit Risk Management</i> <i>Susan Streich, Director Office of Financial Program Operations</i> <i>Annette May, Acting Deputy Director LGPC</i>
11:45 am to 12:00 pm	Coquina South Hall	Prize Giveaways Stay until the end to see if you've won our \$500 grand prize (must be present to win).