



**Great Lakes**  
Lenders Conference

PRESENTED BY



**WINDSOR**  
ADVANTAGE

**JULY, 20-21**

**2022**

**DETROIT MARRIOTT AT THE RENAISSANCE CENTER**

**[www.GreatLakesLenders.com](http://www.GreatLakesLenders.com)**

## **TRAINING SBA LENDERS IN THE GREAT LAKES REGION**

**JULY 20-21, 2022**

For Bank and Non-Bank Lenders and their supporting organizations.  
2.5 days of training and networking with fellow lenders of all levels and all roles in SBA lending.

**REGISTRATION CLOSES**  
**JULY 12, 2022**

**SPONSORSHIPS OPEN THRU**  
**June 1, 2022**

**[www.GreatLakesLenders.com](http://www.GreatLakesLenders.com)**



**844.887.6477**



**GLLC@EVENTFULLYYOURZ.COM**

The Great Lakes Lenders Conference is the premier small business lending event in the Midwest providing timely and relevant guidance to lenders directly from SBA leadership on small business lending programs. The conference is attended by individuals and organizations involved with delivering capital to small businesses, including bank executives, loan officers, credit analysts, underwriters, documentation specialists, loan service providers, attorneys, business consultants, SBA staff and other individuals supporting small business lending.

Previous conferences have drawn more than 400 attendees, included participation from the SBA District offices of Cleveland, Columbus, Indiana, Illinois and Michigan, and featured keynote speakers such as SBA Administrator Linda McMahon, SBA Headquarters officials, experts from the Federal Reserve, and Great Lakes business leaders.

The conference is planned to be held in-person, with virtual attendance as an option for those restricted from doing so. Marriott's [Commitment to Clean policy](#) will support our efforts to provide a safe and healthy conference environment for all our attendees.

## CONFERENCE AGENDA

### Tuesday, July 19<sup>th</sup>

3:00 pm	Hotel Guest Check-In for Overnight Attendees
1:00 – 4:30 pm	Optional Pre-Conference Training*
4:00 – 7:00 pm	Early Conference Check-In for Attendees & Exhibitors
4:00 – 7:00 pm	Exhibitor Setup

### Wednesday, July 20<sup>th</sup>

7:30 – 4:00 pm	Attendee Check-In/Registration Desk Open
8:00 – 9:15 am	Breakfast with Exhibitors
9:30 – 10:45 am	Opening Session
10:45 – 11:15 am	Morning Break with Exhibitors
11:15 – 12:15 pm	Breakout Sessions
12:15 – 1:30 pm	Networking Lunch in Exhibit Hall
1:30 – 2:30 pm	Breakout Sessions
2:30 – 3:00 pm	Afternoon Break with Exhibitors
3:00 – 4:00 pm	Breakout Sessions
5:00 – 7:00 pm	Boarding for Sunset Yacht Dinner Cruise
5:30 – 8:30 pm	Sunset Yacht Dinner Cruise

### Thursday, July 21<sup>st</sup>

7:45 – 9:00 am	Breakfast with Exhibitors
9:00 – 10:30 am	Breakout Sessions
10:30 – 11:00 am	Morning Break with Exhibitors
10:30 – 11:00 am	Hotel Checkout & Luggage Storage
11:00 – 12:00 pm	Breakout Sessions
12:15 – 2:00 pm	Closing Lunch, SBA HQ Panel, SBA Awards

\*Optional activity for additional cost

\*If you are new to SBA lending, check out our optional pre-conference training class on Tuesday, which provides a great foundation of SBA lending prior to the conference starting. This class reviews all the basics with practical takeaways, and a great introduction setting you up for a greater understanding in order to attend our more advanced conference breakout sessions. Class size will be limited! See page 7 for details.

**Our 20 Breakout Sessions will include the following topics:**

- Best Practices in SBA Lending
- Advanced 7(a) Lending
- Advanced 504 Lending
- Starting, Growing & Managing your SBA Dept.
- Lender Oversight
- Loan Fraud
- MEDC Capital Program
- USDA Lending
- Microlending
- Small Business Export
- MEDC STEP
- LGPC – Top 10 Screen Outs
- Leadership for Women in SBA Lending
- Business Acquisitions/Change of Ownership
- Construction Finance/Surety Bonds
- Loan Origination using E-Tran
- Servicing & Liquidation
- New FTA: 1502 Reporting
- Secondary Market
- PARRiS Score/Risk Rating
- Guaranty Purchase Case Studies
- Underserved Community Navigator
- Underserved Urban Lending

\*\*Sessions and topics subject to change

## ABOUT THE VENUE:

### Detroit Marriott at the Renaissance Center

An unforgettable experience awaits at Detroit Marriott at the Renaissance Center. Situated downtown along the Riverwalk, near the TCF Center, Ford Field, Little Caesars Arena, Comerica Park and other attractions, the hotel welcomes you with contemporary design and a newly renovated modern lobby. Guestrooms offer fabulous views of the city, floor-to-ceiling windows, comfortable bedding, and high-speed Wi-Fi. Onsite dining options include the *Fuell* restaurant with floor-to-ceiling windows overlooking the Detroit Riverwalk, the Motor City Pantry with full carry-out menu and sundries, and an onsite Starbucks. [Reserve your room at the group rate via our website HERE.](#)



### Group Rate \$163

Reserve your room before the Cutoff Date of June 28<sup>th</sup>

*A limited number of Government per diem rate rooms are available to government employees. Contact us at [GLLC@eventfullyyourz.com](mailto:GLLC@eventfullyyourz.com) to request your reservations.*



## LOCAL AREA

Situated in the heart of downtown along the Riverwalk, the Marriott is convenient to a host of activities, shopping, dining and sightseeing including Comerica Park, home of the Detroit Lions football team, the Henry Ford Museum, casinos, Belle Isle Park and more!

[Explore the Local Area](#)





## CONFERENCE NETWORKING EVENTS

Throughout the conference, there will be multiple opportunities to network with colleagues. All networking breaks will be at least 30 minutes with both breakfasts and Wednesday's lunch served inside the exhibit hall. Our Wednesday evening sunset yacht cruise provides the perfect backdrop for a fun evening, following a day of sessions.

### Networking Lunch Wednesday, 7/20 12:15-1:30 pm

Join us for a buffet lunch inside the exhibit hall while you visit with our exhibitors and play the event game for multiple chances to win prizes or stop by the LendersConnect lounge to receive a free chair massage and/or headshot during lunch!



### Sunset Yacht Cruise aboard the Ovation Wednesday, July 20th 5:30 - 8:30 pm



**Included FREE for all Conference Attendees  
Space is limited to the First 300 to Register!**

## Ovation

### 138-FOOT, TRI-LEVEL YACHT

Ovation Yacht's main deck is a magnificent full-length dining salon complete with a gourmet galley kitchen. The mid-deck is outfitted with a full-service bar, cocktail lounge, private suite and outdoor aft deck. Ovation's top deck features an open-air sundeck, dance floor, second full-service bar and pilothouse.

### FREE

for All Conference Attendees

Includes Dinner, Open Bar, Sunset Views, DJ on board and more!

*Sponsored by our Diamond and Gold Sponsors with option to add to your Silver or Bronze sponsorship for \$2,000.*

## SBA LENDER RECOGNITION

Although the timing of our conference does not allow for fully awarding our top SBA lenders of 2022, look for future communications recognizing individual lenders and lending institutions for exemplary performance delivering capital to the small business community.



## SPONSORSHIP OPPORTUNITIES

The Great Lakes Lenders Conference offers a variety of sponsorship opportunities that provide exposure not only to our conference attendees, but also to our entire contact list via pre-conference advertising and promotions. Contact our events team at EventfullyYourz to discuss sponsor opportunities at (844) 887-6477 or [GLLC@eventfullyyourz.com](mailto:GLLC@eventfullyyourz.com).

Sponsors of the GLLC seek to engage with the Conference audience, raise awareness of services offered to the small business lending community, and provide philanthropic support to a program that contributes to the growth of the Great Lakes economy and small business community.

**Sponsorship is open now through June 15<sup>th</sup>, 2022.**

Exhibitor only sponsorships will be available starting June 1<sup>st</sup>, pending availability, so that we may offer our higher level sponsors first rights to exhibit hall space.

We have implemented favorable cancellation and refund policies for sponsors (see page 9) – register now to start receiving exposure!

### **\*\*New This Year\*\***

Our **SUNSET DINNER CRUISE** will be our **ONLY** evening networking event and will be exclusively sponsored by our **Diamond and Gold sponsors PLUS up to 5 additional sponsors (limited to first 5 silver or bronze sponsors to add the option when registering).**





# SPONSORSHIP LEVELS & BENEFITS



	<b>Diamond \$8,500</b>	<b>Gold \$5,000</b>	<b>Silver \$3,000</b>	<b>Bronze \$1,300</b>	<b>Exhibitor \$1,500</b>
Exclusivity	Title Sponsor - Only 1	N/A	N/A	N/A	N/A
Exhibit Table**	INCLUDED	INCLUDED	+\$500	+\$700	INCLUDED
Exhibit Table Location	Choice*	Choice*	Choice*	Assigned	Assigned
# Attendees Included	4	3	2	1	1
Logo on Marketing Emails & Website	YES	YES	YES	YES	Name Only
Logo on Conference Banners	YES	YES	YES	YES	NO
Logo on all Attendee Materials	YES	NO	NO	NO	NO
Featured Event Sponsor with Signage/Recognition	Opening Session Closing Session Sunset Cruise	Lunches Sunset Cruise	Breakfasts	Breaks	N/A
Added Sponsor Options	---	---	Sunset Cruise (\$2000)	Sunset Cruise (\$2000)	---
Verbal Recognition during Opening and Closing	YES	YES	YES	NO	NO
Provide Pre-Conference Training Class (upon committee approval)	YES	NO	NO	NO	NO
Speaking Opportunity	5-Mins Opening Session Breakout Moderator	Breakout Moderator	N/A	N/A	N/A
Digital Sponsor Ad	YES	YES	YES	N/A	N/A
Media Promotion	Interview on MI SBDC "Across the State" Podcast (1) Email Article/Ad	(1) Email Article/Ad	N/A	N/A	N/A
Copy of Attendee List	4 Weeks Prior and 2 Weeks Prior	2 Weeks Prior	2 Weeks Prior	2 Weeks Prior	2 Weeks Prior

*\*\*Exhibitor location selections will be made once sponsorship closes. First choice will be given to the highest-level sponsor(s) in order of date registered, continuing to the next level and so on. Bronze and exhibitor-only sponsor locations will be assigned. Exhibitor-only level will be available beginning June 1, 2022 pending availability to provide higher level sponsors first options to utilize included booths.*

Register your sponsorship by JUNE 15<sup>th</sup> online via [www.GreatLakesLenders.com](http://www.GreatLakesLenders.com).

# ATTENDEE REGISTRATION INFORMATION

Attendee and sponsorship registration is available online via our website at <http://www.GreatLakesLenders.com/>. Don't delay – register today!

**Early Bird** **\$399**

*First 50 to register*

**Regular** **\$449**

*Through June 1<sup>st</sup>*

**Late** **\$499**

*June 2<sup>nd</sup> through July 12<sup>th</sup>*



Ticket includes all conference sessions, meals and sunset yacht cruise. Government rate is \$349 at all times. Registration closes July 12<sup>th</sup> or once we sell out – **Walkup registration will NOT be available – advance conference registration is required.**

**Leaders from the Office of Capital Access** will join us at both our Opening and Closing sessions to provide valuable updates, and our keynote economist, Dr. Paul Isely will provide an economic forecast to close out our conference – don't miss it!

Our **20 breakout sessions** will cover relevant topics for all roles and levels of SBA lending (see page 2 for details).



## Optional Pre-Conference Training Class

*SBA Lending from A to Z for New Lenders: A Comprehensive Plan for Success*

**Tuesday, July 19<sup>th</sup> 1:00-4:30 pm**

**Onsite at Marriott**

*Cost for Conference Attendees (\$99) Cost for Non-Conference Attendees (\$199)*

Are you and your team new to SBA Lending? Wondering what the fuss is about and how to get started? This class reviews all the basics with practical takeaways, and a great introduction setting you up for a greater understanding in order to attend our more advanced conference breakout sessions. Class size will be limited!

Join Chuck Evans, EVP of Windsor Advantage, Lance Sexton, former Deputy Director of Little Rock Servicing and now EVP with Fountainhead and Brent Ciurlino, former Director of Office of Credit Risk Management and now EVP with Blue Foundry Bank as we review the steps you need to consider when developing a successful SBA department. This session will cover all the basics including:

1. An Overview of the various SBA lending programs – 7(a), 504, Community Advantage, Microlending and more
2. Originating, closing and servicing an SBA Loan – pitfalls to avoid
3. Servicing an SBA Loan
4. 7(a) Basics – Systems and Setup
5. Determining eligibility and loan structure effectively
6. How to “Stay between the white lines” with Office of Credit Risk Management
7. Utilizing portfolio management tools

## Refund & Cancellation Policy:

Please review the policies below prior to registering.

**SPONSORS must pay in full within 30 days of registration date, or by July 1<sup>st</sup>, 2022, whichever is sooner, to avoid loss of sponsorship benefits.** Sponsors may request to cancel in writing up until May 15<sup>th</sup>, 2022 to receive a 50% refund via the original payment method, at which time all sponsor benefits are then forfeited. If request to cancel is received on or after May 16<sup>th</sup>, 2022 no refunds can be given, and sponsor may choose to retain all benefits if desired. Partial refunds cannot be applied if physical attendance or use of any included benefits are not desired. Included sponsor attendees may be substituted or gifted to lenders/clients up until July 8<sup>th</sup>, 2022.

**INDIVIDUALLY PAID ATTENDEES (not included with sponsorships)** may request to cancel in writing at any time by emailing [GLLC@eventfullyyourz.com](mailto:GLLC@eventfullyyourz.com), and will have the following options:

1. Cancel entirely (virtual access cannot be provided) –
  - a. If cancelled by May 31, 2022, a full refund will be provided via original payment method
  - b. If cancelled between June 1<sup>st</sup>, 2022 and June 30<sup>th</sup>, 2022, a 50% refund via original payment method will be provided
  - c. If cancelled on or after July 1<sup>st</sup>, 2022, a refund or credit cannot be provided OR
2. Substitute an attendee at any time up until close of online registration, which is July 12<sup>th</sup>, 2022 by emailing [GLLC@eventfullyyourz.com](mailto:GLLC@eventfullyyourz.com) with the following information for the substituted attendee:
  - a. Name
  - b. Company
  - c. Email Address
  - d. Job Title
  - e. Work Phone
  - f. Work Address
  - g. Years in SBA Lending
  - h. Dietary Restrictions

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**If the in-person conference is cancelled by the organizers for any reason including but not limited to COVID-19 restrictions, and a virtual option is not provided,** attendees and sponsors will receive a FULL credit to use toward a future EventfullyYourz-managed conference, including virtual and/or in-person training or conference events (includes but may not be limited to SESBLC, America East, America West, Music City, Kentucky, FLAGGL, Great Lakes Lenders or MALC).

**If the in-person conference is converted by the organizers for any reason to a virtual-only format,** all sponsors and attendees will automatically transfer to the virtual format with reduced cost for both sponsors and attendees, with the difference in amount paid provided as a monetary refund. Should an attendee or sponsor choose not to attend the virtual conference, additional refunds or credits cannot be provided.

