MALC 2025

BREAKOUT SPEAKER INFO

Thank you for your participation in MALC 2025. We are happy to have you as one of our breakout speakers. Please read the guidelines below for helpful information about your session. Please visit us at the registration desk with questions.

MOBILE APP

Registration Desk Hours:
Sunday, 4:00 PM-7:00 PM
Monday, 12:00 PM-6:30 PM
Tuesday, 7:15 AM-3:30 PM
Wednesday, 7:15 AM-11:00 AM

Wi-Fi Info:

Network: Margaritaville_Conference
(no password necessary)

Please check in to your assigned room 15 minutes before your session start time so we know you're here (room assignments are included in the attached agenda).

INFORMATION & EQUIPMENT

Your assigned facilitator will introduce themselves to you before your session begins. He/she will introduce you, keep the session running on time, facilitate any Q&A, and close out the session for you. Please be sure to keep to your scheduled session time so we can keep everything running on time. Please leave 5-10 minutes at the end of your session for questions and closing.

Each room will be equipped with a projector, laptop, slide advancer and projection screen. Larger rooms may also include microphones.

PREPARATIONS

Previously provided presentations will be saved on the laptop in the session room and up on the screen for you.

PLEASE REFRAIN FROM DISCONNECTING OR ADJUSTING ANY CONNECTIONS TO OR SETTINGS ON THE COMPUTER.

If you will not be using a presentation during your session, we ask that you power down the projector to save the lamp (press Power button twice) but leave everything connected as is. If you did not already provide a presentation, bring it with you on a USB/FLASH DRIVE and an EventfullyYourz conference staff member can assist you with saving it to the computer – PLEASE DO NOT remove any other plugged in USB devices without first checking with an EY staff member. We will be in and out of each breakout room in the 10-15 minutes prior to your session. Please sit tight until our team or the AV team arrives if there and we will address and issues or needs at that time. Thank you!

GUIDELINES

- Your session time INCLUDES Q&A as applicable – please be sure to plan your time accordingly.
- The goal is education (please no commercials for your product or service).
- If there are several presenters in your group, please work together to decide who will speak to certain aspects of the subject matter.

Thank you for your participation!

BREAKOUT SESSION SCHEDULE for Monday, April 14th

All sessions are held in the Conference Center. (V)=Virtual

Time	*Room*	*Session Title*	*Speaker(s)*
4:15 - 5:15 pm	Nautical 1/2	**Repair-ville...How to Handle Servicing Issues & Avoid SBA Repairs** *MALC Facilitator: Jim Kahler*	*Larry Porterfield, Lance Sexton*
4:15 - 5:15 pm	Nautical 3/4	**Smooth Sailing in Franchise Lending** *MALC Facilitator: Courtney McClendon*	*Paul Santomauro*
4:15 - 5:15 pm	Coastal Ballroom	**SBA in Paradise: The Latest 7(a) & 504 Policy Updates & Hot Topics** *MALC Facilitator: Harry Leach*	*Linda Reilly (V), Ginger Allen (V)*
4:15 - 5:15 pm	Latitude	**License to Lend: 7(a) Specialty Loan Programs** *MALC Facilitator: Jentri Smith*	*Jeremy Foreman (V), Dan Pische (V)*

BREAKOUT SESSION SCHEDULE for Tuesday, April 15th

Time	*Room*	*Session Title*	*Speaker(s)*
8:30 - 9:30 am	Nautical 1/2	**Margarita Money: BDO Secrets to Building a Winning SBA Pipeline** *MALC Facilitator: Courtney McClendon*	*Chris Hackney, Alan Peterson, Ryan Kroge, Emily Detor*
8:30 - 9:30 am	Nautical 3/4	**It's 504 Somewhere: CDC & Lender Panel with Case Studies** *MALC Facilitator: Cheryl Kizer*	*Harry Leach, Vince Calicchia, Greg Dunn*
8:30 - 9:30 am	Coastal Ballroom	**Surfing in a Hurricane: Updates from OCRM** *MALC Facilitator: Jim Kahler*	*Nick Jellum*
8:30 - 9:30 am	Latitude	**Fins Up for Fintech: ETRAN & 1502 Overview** *MALC Facilitator: Jentri Smith*	*Sherri McConville (V), Christopher Anthony, Joe Kueny*
10:00 - 11:00 am	Nautical 1/2	**Closing, Servicing, & Funding Roundtable** *MALC Facilitator: Valerie Alldredge*	*Nasr Khan*
10:00 - 11:00 am	Nautical 3/4	**BDO/Sales Officer Roundtable** *MALC Facilitator: Harry Leach*	*Courtney McClendon*
10:00 - 11:00 am	Coastal Ballroom	**SBA Manager Roundtable** *MALC Facilitator: Jim Kahler*	*Jentri Smith*
10:00 - 11:00 am	Latitude	**Underwriter Roundtable** *MALC Facilitator: Christian Contreras*	*Christian Contreras*
12:30 - 1:30 pm	Nautical 1/2	**He went to PARRiS Looking for Answers: Understanding PARRiS & SMART Reviews** *MALC Facilitator: Jim Kahler*	*Nick Jellum*
12:30 - 1:30 pm	Nautical 3/4	**Boat Drinks & Brand Awareness: How to Stand Out in a Crowded Market** *MALC Facilitator: Vince Calicchia*	*David Hall, Priscilla Picasso, Crissy Nolen*
12:30 - 1:30 pm	Coastal Ballroom	**SBA in Paradise: The Latest 7(a) & 504 Policy Updates & Hot Topics** *GLQC Facilitator: Jentri Smith*	*Linda Reilly (V), Ginger Allen (V)*

BREAKOUT SESSION SCHEDULE for Wednesday, April 16th

Time	*Room*	*Session Title*	*Speaker(s)*
8:30 - 9:45 am	Nautical 1/2	**Son of a Son of a Secondary Market: Trends, Best Practices, & Opportunities** *MALC Facilitator: Doug Anders*	*Ken Rosenthal, Karen Bean*
8:30 - 9:45 am	Nautical 3/4	**Landsharks at the Door: Avoiding Fraud & Protecting Your Portfolio with the OIG** *MALC Facilitator: Michelle Wright*	*Shane Kipp*
8:30 - 9:45 am	Coastal Ballroom	**Come Monday, Get It Funded: Closing, Funding, & Construction Monitoring** *MALC Facilitator: Courtney McClendon*	*Stephanie Taylor, Stacie Griffin, Gladys Castenell*
8:30 - 9:45 am	Latitude	**Wastin' Away Again in Third-Party Reports** *MALC Facilitator: Jim Kahler*	*Sach Prasad, Jerry Brown Sr., Brandon Hall, Michael Cantu*