



**Welcome to the 2025  
Mortgage Originators  
Convention!**

# 2025 ITINERARY

## Thursday, March 6

### **6:30 p.m. - 10:00 p.m. | Welcome Reception at the Lauderdale Yacht Club**

Bus will arrive at the Convention Entrance at 5:50 p.m. and depart at 6:10 p.m.  
Returning bus will depart from the yacht club at 10:00 p.m.

## Friday, March 7

### **8:45 a.m. - 2:30 p.m. | Golfing at Jacaranda Golf Club**

Bus will arrive at the Convention Entrance at 6:45 a.m. and depart at 7:00 a.m.  
Returning bus will depart from the golf course at 1:45 p.m.

### **9:00 a.m. - Noon | Mimosa, Bloody Mary & Coffee Bar**

Available on the Palm Terrace; exit the Main Lobby toward the beach to access

### **9:30 a.m. - 10:30 a.m. | Yoga on the Beach**

South beach; no pre-registration required

### **1:00 p.m. - 4:00 p.m. | Educational Sessions in the Caribbean IV Ballroom**

Located on the first floor, around the corner from Starbucks

### **7:00 p.m. - 11:00 p.m. | Stone Crab Dinner & Casino Night at Bonnet House**

Bus will arrive at the Convention Entrance at 6:00 p.m. and depart at 6:20 p.m.  
Returning bus will depart from Bonnet House at 11:15 p.m.

## Saturday, March 8

### **8:00 a.m. - Noon | Deep Sea Fishing**

Vans will arrive at the Convention Entrance at 6:45 a.m. and depart at 7:00 a.m.  
Returning vans will depart from the dock at noon

### **10:50 a.m. - 4:15 p.m. | Golfing at Jacaranda Golf Club**

Bus will arrive at the Convention Entrance at 8:45 a.m. and depart at 9:00 a.m.  
Returning bus will depart from the golf course at 4:00 p.m.

### **9:00 a.m. - Noon | Mimosa, Bloody Mary & Coffee Bar**

Available on the Palm Terrace; exit the Main Lobby toward the beach to access

### **9:30 a.m. - 10:30 a.m. | Yoga on the Beach**

South beach; no pre-registration required

### **Noon - 4:00 p.m. | Beach Party**

North beach

### **6:00 p.m. - 8:30 p.m. | Dinner Reception & Live Entertainment on the Beach**

South beach

### **8:30 p.m. - Midnight | After Party Inside the Riva Hotel Bar**

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***If you need anything during the conference, please contact:***

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# Meet Our SPEAKERS

## Keynote Speaker



### **2025 Economic Forecast & Potential Impacts on the Mortgage Industry**

Presented by:

**Christopher M. George**

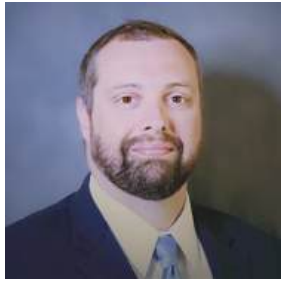
*President and Chief Executive Officer*  
CMG Financial

As Founder, President and CEO of CMG Financial, Christopher M. George has spent three decades cultivating an organization capable of sustaining and thriving through cyclical market fluctuations. He accomplished this through responsible risk management while identifying and capitalizing on key emerging markets.

Christopher prioritizes regulatory compliance and champions industry and consumer advocacy through direct participation at the local, state and federal levels. In 2012, he established the CMG Foundation, a philanthropic endeavor to support non-profit organizations at both the community and national levels. To date, the CMG Foundation has provided valued funding for the Gary Sinise Foundation's R.I.S.E. program, the Mortgage Bankers Association's MBA Opens Doors Foundation™, Homes for Our Troops and the Cancer Support Community SF Bay Area programs, as well as benefitting a host of other local organizations.

In addition to his role at CMG Financial, Christopher is a past Chairman of the Mortgage Bankers Association (MBA), a member of the MBA's Board of Directors, past Chairman for California Mortgage Bankers Association (CMBA), a member of the CMBA's Board of Directors and has served on many advisory boards and task forces within the industry.

# Additional Speakers



## **Overview of Fifth Third Bank: Product Offerings for Correspondent & Commercial Solutions Available to Lenders**

Presented by:

**Tim Shelley**

*National Correspondent Channel Manager*  
Fifth Third Bank

Tim Shelley is the Head of Correspondent Lending at Fifth Third Bank, where he oversees the sales, operations and third-party management of the Correspondent Mortgage channel. Tim joined Fifth Third in 2024, bringing extensive experience from his previous roles at Huntington National Bank and TCF Bank. At these institutions, he led finance teams as CFO of the Home Lending and Regional Banking business lines, driving strategic growth and financial performance. Tim is passionate about continuous learning and professional development. He holds an MBA from the Carlson School of Management at the University of Minnesota and has earned the Accredited Mortgage Professional designation from the Mortgage Bankers Association. Residing in Blaine, Minnesota, with his wife and two children, Tim enjoys spending time outdoors with family and friends. He is looking forward to escaping the Minnesota winter weather during his visit to Florida.



## **AmeriHome's 2025 Product Rollouts, Including Non-Agency Products & eNotes**

Presented by:

**Gil Lopez**

*Senior Vice President,  
National Sales Director — Central Division*  
AmeriHome Mortgage

Gil Lopez, SVP and National Sales Director for AmeriHome's Central region, will be covering AmeriHome's 2025 product rollouts including their non-agency suite of products as well as eNotes. AmeriHome is the largest bank owned correspondent lender and, throughout 2025, they are focusing on driving margin and volume while utilizing the beneficial synergies of their parent company, Western Alliance Bank.

Gil Lopez joined AmeriHome's Correspondent Sales team in 2014 and is responsible for business growth and development and effective client relationship management in the 20 central states which comprise the Central Sales Region. He has over 25 years of mortgage industry expertise in sales leadership, business development, capital markets and structured finance in various leadership roles with companies such as Morgan Stanley, Credit Suisse, New Century, PMI and Bank One.



## **A Look Back at 2024 & What to Expect in 2025 For Warehousing**

Presented by:

**Jessica Lapresi**

*National Account Executive*  
Ameris Bank

Jessica Lapresi has more than 15 years of experience in the mortgage industry. Her career began in 2009 when she was hired as a Mortgage-Backed Securities Trader at Multi-Bank Securities, Inc. There, she learned a great deal about the secondary market and securitization. Since then, she switched over to the warehousing side of the industry and began working with Ameris Bank as a National Account Executive, with the responsibility of fostering and developing new warehouse lending relationships. She has now been with Ameris Bank for more than 9 years and manages over \$650MM in credit lines ranging from \$3MM to \$150MM.



## **Market Insights**

Presented by:

**Britt Bachelder**

*VP, Lending Solution Sales*  
Curinos

Britt Bachelder serves as the leader of the home lending sales team at Curinos, a prominent financial services analytics and consulting firm. In her role, Britt is dedicated to providing innovative solutions and strategic advice that empower clients to improve margins, expand market share, fortify their risk management, and achieve operational goals. She holds a degree from the Darla Moore School of Business at the University of South Carolina. With over five years at Curinos and a total of 15 years in the mortgage industry, Britt combines extensive experience with a passion for client success. Outside of her professional commitments, she enjoys quality time with her husband and golden retriever, as well as spending time at the beach, out on the boat and traveling.



## Home Equity Options & Trends

Presented by:

**Shelly Griffin**

*Senior Vice President, Correspondent Sales*  
Deephaven Mortgage

Shelly Griffin is Deephaven Mortgage's SVP of Correspondent Sales. Shelly's energy and drive, combined with her deep experience in the mortgage business, have earned her the respect and appreciation of colleagues and customers alike. As Senior Vice President of Client Development, her profound knowledge of loan processing and underwriting translates into confident, long-term client relationships. Shelly also has a passion for training and team building that makes her a terrific mentor to our next generation of professionals. Shelly first joined Deephaven in 2014 and has helped innumerable mortgage professionals successfully roll out non-agency products for their organizations.



## Non-QM Market Trends & Products/Channels/Delivery

Presented by:

**Tom Davis**

*Chief Sales Officer*  
Deephaven Mortgage

Tom Davis is Deephaven Mortgage's Chief Sales Officer. In this role, he manages Deephaven's wholesale and correspondent sales teams and all marketing initiatives. As an extensively trained mortgage-industry professional, Tom brings 20+ years of experience helping lending partners with their Non-Agency/Non-QM and Agency needs. Prior to joining Deephaven, Tom served as Executive Vice President, Head of TPO Production, at First Guaranty Mortgage Corporation. Over the course of his career, he has worked at Bank of America, First NLC (FBR Capital Markets), JPMorgan Chase, and Finance of America Mortgage. He holds a Bachelor of Finance and Business Administration degree from Florida Atlantic University.



## NFTYDoor Digital HELOC & Coming in the 1st Quarter – Delegated Correspondent Channel

Presented by:

**Matt Rohl**

*National Correspondent Sales Manager*  
Homebridge Correspondent

Matt Rohl is the National Correspondent Sales Manager at Homebridge Correspondent. Homebridge is providing a Private Label Digital HELOC today as well as offering Fannie/Freddie, FHA and Non-QM products starting in the 1st quarter of 2025. Prior to Homebridge, Matt was with Draper and Kramer Mortgage Corp. (DKMC) based in Downers Grove, IL, as SVP of CRA Development and Emerging Markets until they were acquired by New American Funding in early 2024.

DKMC was subject to a 2021 CFPB audit for Redlining that was referred to DOJ. He was hired at DKMC to prepare with internal and external council for the case and put the necessary programs in place to increase the company's lending services in low-to-moderate income and majority-minority areas. Prior to DKMC, Matt had been in the mortgage industry for over 30 years. For more than two decades, he served at the mortgage insurance provider Radian, eventually becoming Divisional Vice President there. Matt resided in Chicago for 25 years and is currently based in Pompano Beach, FL.



## Maximizing Profitability With CompassEdge

Presented by:

**Brad Eskridge**

*Capital Markets Solutions Specialist*

Optimal Blue

Learn how CompassEdge plays an integral role in helping lenders maximize profitability as part of Optimal Blue's end-to-end capital markets platform. This session will showcase how AI-powered functionality reduces manual processes and fosters greater transparency, and attendees will see what's ahead for CompassEdge in 2025 and beyond.

Brad Eskridge is a seasoned capital markets solution specialist. He joined Optimal Blue in June 2023 and has since been instrumental in supporting the sales organization as the subject matter expert for hedging software and services. Brad leads strategy conversations and software demonstrations with prospective customers, showcasing his expertise and commitment to the role.

Before joining Optimal Blue, Brad held several significant roles in various companies. He served as VP, SVP, director and managing director at MIAC Analytics. Prior to that, he was the secondary marketing manager at Dover Mortgage Company, VP of secondary marketing at New Day Financial and director of secondary marketing at USA Home Loans. He also held positions at Aegis Mortgage Corporation as VP, pricing manager, and at Coastal Mortgage Services as senior secondary marketing analyst.

Brad holds a BSBA from the University of North Carolina at Charlotte, further solidifying his credentials in the field. His extensive experience and educational background make him a valuable asset in the realm of capital market solutions.



## MSR Market Update – Bulk & Flow Transactions

Presented by:

**William McPartlon Jr.**

*VP – Trading*

PHOENIX

Since 2017 William has been a part of the mortgage industry's leading MSR and Whole Loan advisory firm, Phoenix Capital. As Vice President of Trading at Phoenix Capital, William advises his clients on their comprehensive MSR and Whole Loan strategies through all market environments. As a transaction executive, William guides clients through the complete bulk and flow transactions lifecycle and all supportive services. In addition, William's responsibilities include strategic MSR and Whole Loan analytics, such as valuations, MSR pricing grids, and retain vs. release best execution.

Along with a full schedule of client and conference travel this year, William will be busy with several long-distance bike racing events and spending time with his two young children and his wife.



# THANK YOU to Our SPONSORS



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Fifth Third Bank, National Association is a consumer/commercial bank that plays an integral role in the nation's residential housing market by providing mortgage servicing, insurance and access to the secondary market through its correspondent lending group to lenders across the country. Through our retail bank, we support home ownership by providing first and second lien mortgages to consumers. Fifth Third Bank is a wholly owned subsidiary of Fifth Third Bancorp (NASDAQ®: FITB).

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AmeriHome Mortgage, a subsidiary of Western Alliance Bank, one of the country's top-performing banking companies and the go-to business bank for mortgage companies, is the largest bank-owned correspondent investor in the country for 2024 according to Inside Mortgage Finance. AmeriHome brings a unique value proposition to mortgage originators and borrowers alike. AmeriHome Mortgage offers a full suite of Government, Agency, and Specialty products and, as a Fannie Mae and Freddie Mac Seller/Servicer and Ginnie Mae Issuer, they purchase agency and government mortgage loan products in 49 U.S. states. With the added synergies of Western Alliance Bank's warehouse lending, MSR financing, and treasury management services as part of a complete business relationship, AmeriHome is a valuable business partner. AmeriHome Retail Lending also offers an extensive menu of products, including loan types for every stage of the home buying journey, and solutions for home financing needs.

[www.correspondent.amerihome.com](http://www.correspondent.amerihome.com)



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Ameris Bank is backed by over \$26 billion in assets and has a strong history of growth since our beginning in 1971. We are a partner to mortgage lenders and other financial institutions seeking to help customers realize the dream of home ownership. Partnership with us means you'll receive the resources, support and service you need as your business grows. Warehouse lines are offered to non-delegated and delegated lenders. We have lines from \$1.5MM to \$150MM. We offer low fees and costs, have competitive interest rates and offer overall savings compared to other banks.

[www.amerisbank.com/Business/Borrow/Warehouse-Participation-Funding](http://www.amerisbank.com/Business/Borrow/Warehouse-Participation-Funding)

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Outsourcing services in U/W, file setup, post-closing, inline QA, QC, inline QA and accounting. We specialize in GNMA delivery, GSE applications, mortgage banking and SFR investment portfolio.

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*Navigate today. Prepare for tomorrow.*

Curinos is the leading provider of data, technologies and market insights that enable mortgage lenders to understand their competitive performance and proactively manage margins. Born out of the combination of two familiar industry powerhouses, Novantas and Informa's FBX business (Icon), Curinos has the DNA across all mortgage channels including retail, wholesale and correspondent, to deliver real value to the industry.

Through access to comprehensive datasets and analytics, intelligent technologies and connected behavioral insights, Curinos is the partner of choice to help attract, retain and grow more profitable relationships.

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Deephaven Mortgage is a pioneer and leader in non-QM since 2012. Their longevity and strength in the non-QM space has allowed a significant number of borrowers to achieve homeownership who otherwise would not have under traditional requirements. Deephaven offers a wide array of non-QM loan products that includes LLC business purpose lending, DSCR cash flow, Expanded-Prime, Equity Advantage Closed End Second, Non-QM HELOC and Non-Prime solutions for borrowers. As experts and educators in the Non-QM sector, Deephaven offers extensive training to all of their mortgage partners. Discover the Deephaven Difference and increase your volume and referral base.

[www.deephavenmortgage.com](http://www.deephavenmortgage.com)



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Homebridge Correspondent Division, headquartered in Iselin, New Jersey, is a division of Homebridge Financial Services, Inc. Homebridge is currently offering a Standalone Digital HELOCs with a full product offering coming in the 1st quarter of 2025 that will include Conventional, FHA, VA, and Non-QM.

[www.homebridgecorrespondent.com](http://www.homebridgecorrespondent.com)



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National Mortgage Insurance Corporation (National MI) is a private mortgage insurer enabling low down payment borrowers to realize homeownership while protecting lenders and investors against losses related to a borrower's default. We're committed to delivering mortgage insurance solutions that are clear, concise, and provide a path to coverage certainty.

[www.nationalmi.com](http://www.nationalmi.com)



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Optimal Blue effectively bridges the primary and secondary mortgage markets to deliver the industry's only end-to-end capital markets platform. The company helps lenders of all sizes and scopes maximize profitability and operate efficiently so they can help American borrowers achieve the dream of homeownership. Through innovative technology, a network of interconnectivity, rich data insights, and expertise gathered over more than 20 years, Optimal Blue is an experienced partner that, in any market environment, allows lenders to optimize their advantage from pricing accuracy to margin protection, and every step in between. To learn more, visit [OptimalBlue.com](http://OptimalBlue.com).



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PHOENIX is the premier advisory firm for MSR and whole loan trading, mortgage services, and analytics. With more than 27 years of industry leadership, PHOENIX has successfully managed trillions of dollars in MSR and whole loan transactions. We provide MSR and whole loan valuation and analytics used for business strategy, sale advisory, capitalization, and financial reporting purposes by hundreds of mortgage market participants.

Customers include a majority of the top 100 mortgage banking firms and mortgage servicers, and the largest and most sophisticated MSR and whole loan investors. Our diverse business lines offer high touch trading advisory, quantitative analysis, consulting, mortgage servicing performance management, origination and servicing quality control, underwriting support, third party due diligence reviews, and a range of other mortgage operations outsourcing solutions. For more information on PHOENIX, please visit [www.phoenixtma.com](http://www.phoenixtma.com).



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Tradeweb Markets Inc. (Nasdaq: TW) is a leading, global operator of electronic marketplaces for rates, credit, equities and money markets. Founded in 1996, Tradeweb provides access to markets, data and analytics, electronic trading, straight-through-processing and reporting for more than 50 products to clients in the institutional, wholesale, retail and corporates markets. Advanced technologies developed by Tradeweb enhance price discovery, order execution and trade workflows while allowing for greater scale and helping to reduce risks in client trading operations. Tradeweb serves more than 2,800 clients in more than 70 countries. On average, Tradeweb facilitated more than \$1.9 trillion in notional value traded per day over the past four fiscal quarters. For more information, please go to [www.tradeweb.com](http://www.tradeweb.com).



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We hope to see you  
again next year.  
Thank you!