

# Preliminary Agenda (subject to change)

Monday August 18, 2014

7:30-8:30	Continental Breakfast						
8:30-9:45	<b>Full Day 7a Program Training</b> 7a Credit Analysis & Underwriting as it relates to Eligibility Break Training Continues Karen McHugh-Instructor	MALC Conference Registration & 7:30 - 5:00 Exhibitor Set Up 8:00 - 11:00					
9:45-10:15							
10:15-12:00							
12-1:30	<b>Opening Lunch</b> <b>Keynote Address - Maria Contreras-Sweet (Invited)</b> <b>Helena Hauk, 2014 MALC Chairman, Yolanda Olivarez, Region VI Administrator</b>						
1:30-3:00	Credit Underwriting/analysis Continues	Breakout Session #1 10 Pitfalls in Determining Eligibility	Breakout Session #2 Construction Risk Management	Breakout Session #3 Exporting Opportunities You May Have Missed	Breakout Session #4 SBA 504 Closing	Breakout Session #5 Business Plans That Get Funded Projections Done Right	Breakout Session #6 New Environmental Rules
3:00-3:30		Break - Visit Exhibitors					
3:30-5:00	Credit Underwriting/Analysis Continues	Breakout Session #7 Outsourcing your SBA Department/LSP Agreements	Breakout Session #8 10 Closing Mistakes that can cost your Guarantee	Breakout Session #9 First lien 504 Market	Breakout Session #10 Franchise Lending	Breakout Session #11 Outsourcing the Bridge Loan 504	Breakout Session #12 SOP 50-50-5 Servicing Update
5:15-6:15		<b>Opening Reception</b> Visit Exhibitors					

## Tuesday, August 19, 2014

7:30-8:30	Breakfast & Networking with Exhibitors					
8:30-9:00	Welcome & Announcements					
9:00-10:00	Ted Jones, Phd. - Economist Stewart Title					
10:15-10:30	Break					
10:30-11:45	Hot Topics - Yolanda Olivares, Moderator Ann Marie Mehlum, John Miller, Linda Reilly, Linda Rusche, Brent Ciurlino Tony Wilkinson (NAGGL) , Kurt Chilcott (NADCO)					
12-1:30	<b>Lunch</b> <b>Ann Marie Mehlum, Associate Administrator, Office of Capital Access</b>					
1:30-3:00	Breakout Session #1 Getting Your Guarantee Funded	Breakout Session #2 SBA Branding	Breakout Session #3 PLP Audit/What to Expect as PLP Lender	Breakout Session #4 Cash Flow /Underwriting The SBA Way	Breakout Session #5 Equity Injection Sources Sometimes Forgotten	Breakout Session #6 10 Pitfalls in Determining Eligibility
3:00-3:30	Break					
3:30-5:00	Breakout Session #7 Franchise Lending	Breakout Session #8 504 Overview Deal Structuring Case Studies	Breakout Session #9 Perfect 7a Applications Submissions-10 tab	Breakout Session #10 E-Tran Problem Solving Solutions	Breakout Session #11 Business Plans That Get Funded Projections Done Right	Breakout Session #12 New SOP Requirements 50-10-5 E
6:00-9:00	Dine Arounds					

## Wednesday, August 20, 2014

7:30-8:00	Continental Breakfast & Networking with Exhibitors					
8:00-8:45	<b>Breakfast</b> <b>Keynote Speaker - Brent Ciurlino OCRM</b>					
8:45-10:15	<b>Full Day 504 Training</b> Mike Vanchiere - Topic - 504 Eligibility & Deal Structuring	Breakout Session #1 Cash Flow /Underwriting The SBA Way	Breakout Session #2 1502 Reporting Getting it Right the First Time	Breakout Session #3 10 Closing Mistakes that can cost your Guarantee	Breakout Session #4 E-Tran Problem Solving Solutions	Breakout Session #5 New Environmental Rules
10:15-10:30		Break				
10:30-12:00	Training Continues	Breakout Session #6 Business Acquisitions Valuations	Breakout Session #7 New SOP Requirements 50-10-5 E	Breakout Session #8 Perfect 7a Applications Submissions-10 tab	Breakout Session #9 PLP Audit/What to Expect as PLP Lender	Breakout Session #10 SOP 50-50-5 Servicing Update
12:00-1:30		<b>"Meet Your Lenders" Panel</b> <b>SBA - Ann Marie Mehlum, Linda Reilly, Linda Rusche, John Miller, Brent Ciurlino</b>				
1:30-3:00	Training Continues					
3:00-3:30	Break					
3:30-5:00	Training Continues					
5:00	Training Concludes					

### SBA Attendees confirmed to date:

Ann Marie Mehlum, Associate Administrator, Office of Capital Access  
 Linda Rusche, Director of Financial Assistance, Office of Capital Access  
 Linda Reilly, Financial Analyst, Office of Financial Assistance  
 John Miller, Director, Office of Program Operations and Office of Portfolio Management  
 Brent Ciurlino, Director, Office of Credit Risk Management  
 Rick Schulze, Int'l Trade Finance Manager - Western U.S., Office of International Trade