



Professional Development Forums for Senior Mortgage Lenders 2017

Middlesex Savings Bank Training Center
120 Flanders Road, Westborough, MA

Do you wish you had regular opportunities to grow professionally, network, enhance your overall understanding of ongoing industry trends and discuss critical issues with other real estate lending executives? The 2017 forums can provide just what you need!

Last Forum!

October 13

Washington Update, Succession Planning and Talent Management

How do the forums work?

- Small groups will be organized based on annual origination volume. Due to the nature of the program, substitutes will be allowed but not encouraged.
- A guest speaker will present information on a timely and critical topic.
- An audience response system (ARS) will be used to obtain real-time feedback on timely issues.

Schedule of Events:

8:30 a.m. Registration—Continental Breakfast
 9:00 a.m. Forum Convenes
 Noon Working Lunch
 2:00 p.m. Adjourn



What Attendees are Saying About the Forums:

"I have been part of the Mass Bankers Senior Lender Forum since its inception, and find the sessions to be very worthwhile. It is a great group of bankers who share valuable insight into how their lending operations work, how they have implemented numerous regulations, etc. It is one of the best networking events that I attend. I highly recommend these sessions for anyone in a management capacity in the lending industry."

Denise D. Walker, Director of Retail Lending, Country Bank for Savings

"I have found the forum to be extremely helpful. In particular, it has been terrific to share ideas with others in the same position. I give the forum two thumbs up!"

Jon Auger, Senior Vice President, Retail Lending, Middlesex Savings Bank

"Having access to lenders with the same compliance challenges we face has been invaluable."

Christiana Rose, Assistant Vice President, Residential Lending, Norwood Bank

Participation is an investment for you and your bank's future.

Don't miss this opportunity!

2017 Senior Mortgage Lenders Forums

Sessions are being held at the Middlesex Savings Bank Training Center, 120 Flanders Road, Westborough, MA. Participation is limited to senior lenders or those with management responsibilities.

Enrollment Fees for Three-Session Forum:

Members	Non-Members
\$599	\$1,190
Each Individual Session:	
\$250	\$500

Last 2017 Session Date

Thursday October 13:

Washington Update, Succession Planning and Talent Management

Meet Your Facilitator

James D. Jones is founder, president & CEO of First Wellesley Consulting Group, Inc. (www.FirstWellesley.com), located in Wellesley Hills, MA. The firm was recognized as the Best of 2010 and 2013 Gold Award Winner by *Banker & Tradesman*.

Mr. Jones, a 35-year industry veteran, is also a nationally known speaker who discusses innovative strategies, best practices, emerging technologies and industry trends. He is a former bank executive, mortgage executive and Big 4 consultant. He speaks nationally at industry conferences to CEO, director and management audiences and educates industry professionals in strategy and technology. Mr. Jones serves on the core faculty of the New England School for Financial Studies. He is the author of *Strategic Planning for Mortgage Lenders*, published by the Mortgage Bankers Association, and is designated as an MBA Master Faculty Fellow.



2017 Senior Mortgage Lenders Forums Registration

Name		
Nickname		
Title		
Institution		Loan Volume
Billing Address		
City	State	Zip
Telephone		
Fax		
Email		

Register online at www.massbankers.org or
Return completed form and payment to:

Massachusetts Bankers Association-SMLF-17
One Washington Mall, 8th Floor
Boston, MA 02108-2603

Check made payable to Mass. Bankers Association \$ _____
For credit card payments, please register online, if you cannot you may complete the following and fax to our **secure fax line** (617) 249-0441. We cannot accept credit card payments via email.

MasterCard Visa American Express Discover

Card Number _____

Expiration Date _____

Signature _____

Cancellation and Refund Policy:

PLEASE NOTE: October 10, 2017 is the deadline for cancellations. A \$100 per person cancellation fee will be charged. Withdrawals from individual sessions after that date will forfeit the enrollment fee. Enrollment will remain open until the sessions are full. Direct inquiries or registration/cancellation requests to Pat Tabolsky, Registrar, ptabolsky@massbankers.org.

