

2019 THE FUNDAMENTALS OF SECONDARY MORTGAGE LENDING

Monday - Wednesday,
April 15-17, 2019
Crescent Mortgage Company Offices
Atlanta



SUMMARY

It all starts with the dream of owning a home. To turn that dream into reality, a consumer will usually turn to a loan originator for expertise and guidance as they investigate the home-buying process. Where can you, our bankers, go for guidance?

The CBA is pleased to partner with **Crescent Mortgage Company**, Atlanta, a CBA Endorsed Provider and **Arch MI**, to provide **The Fundamentals of Secondary Mortgage Lending School**. Instructors will include: **Ashli Matson**, Vice President & Account Executive, **Stephanie Clark**, Senior National Trainer & Instructional Designer, **Charity Smith**, Vice President, Training and Business Development as well as **Denise Baumann**, Account Manager.

This school incorporates a high-level overview of the basic principles of processing and underwriting that will help you become comfortable with the fundamental skills required to effectively take, process and close a mortgage application. Join us for this insightful school to maximize your knowledge, effectiveness and value for both your borrowers and your company. After attending this three-day school, you will learn:

- Secondary Mortgage Low Down Payment Loan Programs
- how to logically gather data and documents;
- the importance of a complete 1003;
- risk layering;
- how to evaluate The Four Cs — Credit, Capacity, Capital and Collateral to determine mortgage worthiness; and
- how to ask the right questions to maximize your effectiveness and value to both your borrower and your company, and much more!

SCHEDULE

BOTH DAYS

8:30 am	Registration/ Continental Breakfast
9:00 am	Program
NOON	Lunch
1:00 pm	Program
4:30 pm	Adjourn



REGISTER HERE

We invite you to make plans today to join us for this one-of-a-kind school.

REGISTER HERE

Register before March 15
to receive early bird pricing

WHO SHOULD ATTEND

Mortgage Loan Officers, Processors, Originators, and Managers with less than 3 years of experience in the mortgage business. The school is also a great refresher for the seasoned mortgage professional.

SPEAKERS



Ashli Matson – Vice President & Account Executive, Crescent Mortgage Company



Stephanie Clark – Senior National Trainer & Instructional Designer, Arch Mortgage Insurance Company



Denise Baumann – Account Manager, Arch Mortgage Insurance Company



Charity Smith - VP, Training and Business Development, Crescent Mortgage Company

[CLICK HERE TO VIEW SPEAKERS FULL BIOGRAPHIES AND ACCESS THEIR WEBSITES.](#)

LOCATION & ACCOMODATIONS

LOCATION

Crescent Mortgage Company
6600 Peachtree Dunwoody RD, 600 Embassy Row, Suite 650,
Atlanta, GA 30328

www.crescentmortgage.com

ACCOMODATIONS

[Hilton Garden Inn Atlanta Perimeter Center](#)

1501 Lake Hearn Dr NE, Atlanta, GA 30319
(404) 459-0500

[Staybridge Suites Atlanta Perimeter Center](#)

4601 Ridgeview Rd, Atlanta, GA 30338

[Embassy Suites Perimeter Center](#)

1030 Crown Pointe Pkwy, Atlanta, GA 30338

TESTIMONIALS

“Information on all levels; if you have minimum or extensive experience, this would be beneficial.”

Kacey Norris, Pineland Bank, Alma

“Excellent!”

Luis Betances, First Bank of Dalton

“Great information for a beginner. Lots of resources to use.”

Heather Nelson, Colony Bank

THANK YOU SPONSORS!



PRICING

Early Bird Registration (CBA, ARCH MI & Crescent Mortgage Members) Before March	\$795
CBA Member or Crescent & Arch MI Clients - First Attendee	\$895
CBA Member or Crescent & Arch MI Clients - Additional Attendee	\$845
Prospective Member Per Person (pre-payment required)	\$1,195

* Tuition includes comprehensive materials, 3 lunches, 3 continental breakfasts, afternoon snacks



We are community banking.

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