



INTRODUCING

IMBF

2023

WORLD SUMMIT

FRIDAY THE 8TH SEPT

CAESARS PALACE

LAS VEGAS USA

Join over 100 brokers from around the world for this one day event, looking at the issues facing brokers in Australia, Ireland, USA, Canada and the UK.

Thurs 7 Sept

7pm
PRE-FUNCTION I, EMPERORS LEVEL
Evening Welcome
drinks 'til 9pm



All sessions in
Augustus Ballroom
unless indicated

8.45am
Attendee Welcome
by NAMB President Ernest Jones, Jr.

9am
The USA Mortgage Industry & the State of the Nation
Nora Guerra, Freddie Mac, USA

Fri 8 Sept

7.30am
Breakfast

8.30am
Welcome Address
by IMBF Chair Peter J White AM

9.45am
Morning Tea Break & Networking

10.30am
On International Mortgage
by David Stevens, Mountain Lake Consulting, Inc.

IMBF BOARD OF GOVERNORS



PETER J WHITE AM

Peter White AM, IMBF Global Chairman, started as a volunteer with the FBAA in 2003 and is now the Managing Director. Peter's banking & finance career spans 43 years covering retail banking. He established RAMS Home Loans' first office in 1993 and has since run mortgage management & broking businesses of his own.

A strong & passionate advocate for the industry, Peter spends a significant amount of time with regulators & government, as well as being a Registered Lobbyist in his own right. He is the leading advocate & Ambassador for Mental Health Awareness in the finance industry, a conversation he started in 2016.

That year Peter established the IMBF (International Mortgage Brokers Federation), a collaboration of industry associations in six countries – and a global first. He sits on the Small Business Association of Australia's Advisory Board and is a champion & campaigner for mental health issues and the needs of parents & carers of special needs children.

Peter was recognized in the 2019 Queens Birthday Honours with an "AM," Member of the Order of Australia, for significant services to industry & the community. He was awarded the Australian Broking Awards' "Industry Thought Leader of the Year" in 2021. In 2022, he was "Wellness Advocate of the Year" & in the MPA 2022 Global Top 100 mortgage influencers.

LINDA McCOY >

Linda McCoy has been in the mortgage business since 1993. She started out originating with banks and soon became a top producer & branch manager of Chase Manhattan. She soon realized she could do more as a broker because brokers have more options.

Linda opened her own business, Mortgage Team 1, Inc., in 2003. She was awarded the Rising Star Award by the Women's Business Center in Mobile, Alabama. From there she joined AMBA, her state mortgage association, and worked her way up to the presidency in 2010.

Since 2011, Linda has served on the Board of Directors of NAMB (National Association of Mortgage Brokers). In 2021, she became NAMB's first woman president in 25 years. She is passionate about helping her industry & has chaired most of NAMB committees (her favorite is Education). As Education chair, Linda helped create many of the association's most popular certifications.

Linda received NAMB's highest award in 2018, Mortgage Professional of the Year. She was a 2021 "Women with Vision Award" winner & was honored as one of the Trail Blazers. She started



Inspire, a Women's Mentoring Group, which meets monthly to help women who want to succeed in our industry.

In 2021, Linda pushed NAMB to produce a monthly magazine for its members; NAMB Central is now a great vehicle to keep association members up to date on Government Affairs, Certifications, Awards, Lenders, Vendors & more.

Linda joined IMBF's Board of Governors in 2020. She loves the idea of not only helping people in the US but all over the world at the first-ever IMBF Global Summit this year.

Linda lives in Mobile, Alabama, with Tiffany McCoy, her husband of 51 years. They have two children & four grandchildren.

11am Australian Aggregation & the Mortgage Broker Marketplace

by Simon Bednar, Finsure Aggregation, AUS

12pm Lunch & Networking

1pm Board of Governors Panel

2pm White Paper Discussion

Aim to find a proposed resolution to the issues



All sessions in Augustus Ballroom unless indicated

3.30pm Afternoon Tea Break & Networking

4pm Summary

by Linda McCoy, NAMB Past President & IMBF Governor

5pm Closing Remarks

by IMBF Chair Peter J White AM

6pm PRE-FUNCTION I, EMPERORS LEVEL NAMB National Welcome Reception



CARLA GILES ^

Carla is an accomplished leader in the mortgage brokering industry, holding key positions such as the Executive Director of the Canadian Mortgage Brokers Association, CEO of the Mortgage Brokers Association of BC & CEO of the Mortgage Brokers Institute of BC. Her journey in this field began in early 2022, following nearly a decade dedicated to the green building industry, where she worked tirelessly to promote sustainability practices in building design & construction.

With her passion for driving positive change & expertise in leading associations, Carla brings valuable assets to advancing the profile & visibility of mortgage brokers. Throughout her career, she has successfully designed & implemented numerous impactful programs & services, collaborating with industry stakeholders at local, regional & national levels. Now, her primary focus is on supporting the mortgage brokering industry in British Columbia, Canada & beyond.



Carla's qualifications include a B.Sc. (Hons) in Economics & Computing Science, an M.A. specializing in sustainability, and an Executive MBA. Moreover, she is an accomplished Certified Association Executive & an EcoDistricts Accredited Professional.

Recently, Carla completed a digital transformation leadership diploma as well as a UX Design diploma. Her boundless enthusiasm for design & collaboration serves as a driving force behind her relentless advocacy for their transformative power in creating a more sustainable world.

< RACHEL McGOVERN

Rachel McGovern currently holds the position of Director of Financial Services in Brokers Ireland. She holds a number of industry qualifications including the QFA, FLIA & LCOI.

Previously Rachel held the position of COO in the Professional Insurance Brokers Association (PIBA) from November 2000. The PIBA & IBA merged in 2017, forming Brokers Ireland, which is the largest association of Brokers in Ireland.

Prior to her roles in the associations, Rachel worked at both Citibank & the Pensions Authority. Rachel also holds the position of Director of Brokers Ireland Network Services, a mortgage packaging company for Brokers Ireland members.

Brokers Ireland is the representative body for the majority of Mortgage Brokers in Ireland.

Rachel's role is to represent Brokers on both an individual & collective basis with providers, regulators & government, and to promote the value of using a Broker to consumers.



AND YOUR IMBF TICKET INCLUDES
Sat-Sun 9-10 Sept NAMB
NAMB's 50th Anniversary
Conference!



ROBERT SINCLAIR ^

Robert helped establish the Association of Mortgage Intermediaries (AMI) as an independent entity on 1 February 2012. Robert joined the former parent trade body, AIFA, in October 2006, initially looking after the Association of Finance Brokers and since 2008, AMI. He looks after the day-to-day running of AMI and AFB by lobbying government, regulators and other policy-makers, liaising with fellow trade bodies and briefing the national and trade press.

He brings a wealth of industry experience to the trade body having held a number of front line sales roles in personal, private and corporate banking combined with experience in marketing, training and internal audit with both HSBC and Santander.

Robert served five years as a non-executive director of the Buckinghamshire Building Society and advises the Bank of England as a member of the Residential Property Forums.

FEATURED SPEAKERS



8.45am

Ernest Jones, Jr.
NAMB President

With over 20 years of experience as an MLO branch manager & managing partner, Ernest was installed as NAMB's first black president in 2022.

The University of Alabama graduate (1980) served 21 years in the U.S. Air Force prior to entering the mortgage industry. After serving as President of the AzAMP board of directors from 2017-2019, Ernest was selected to join NAMB's board in 2019, was elected NAMB's first black president in 2022.

Ernest's invaluable experience in the military, insurance & securities, real estate, mortgage, small business & nonprofit contributes immeasurably to his ability to positively impact the lives of others.

9am

Nora Guerra
Senior Affordable Lending
Manager, Freddie Mac,
USA

Nora is part of the Single-Family Mission and Client Engagement Division. She supports sales & lending partners to develop and execute seller plans in meeting affordable lending, community outreach & CRA goals.

A veteran of 23 years in the mortgage industry, Nora joined Freddie Mac in 2019 and has held positions of leadership in sales origination, production & sourcing areas in a variety of areas including multicultural & low to moderate income segments.

10.30am

David H Stevens
CMB
CEO, Mountain Lake
Consulting, Inc.

Dave is the CEO of Mountain Lake Consulting, Inc., and a 40-year veteran of the mortgage banking industry.

He previously served as the President & CEO of Mortgage Bankers Association (MBA). Prior to this he was Federal Housing Commissioner at HUD (US Department of Housing and Urban Development).

Dave is often cited in the media & has appeared on CNBC, PBS & Bloomberg TV. He currently sits on the Board of real estate investment trust Dynex, Inc., and works on advisory projects in RE finance.

11am

Simon Bednar
CEO, Finsure Aggregation,
AUS

Simon is an executive with 20 years experience within the Finance Sector. Since his appointment at Finsure CEO in early 2022, Simon has overseen incredible growth of the organisation, highlighted by a broker network of over 2,700 loan writers and a loan book approaching \$100 billion.

Thank you to participating countries Australia, Canada, Ireland, UK & USA!
Next year, we welcome South Africa & New Zealand!



Australia



Ireland



USA



Canada



UK