



**CaliforniaMBA**  
Advocacy. Education. Connection.

## California Mortgage Bankers Association 2018 Future Leaders Program

*Providing an opportunity for the California MBA and its members to help identify and develop the next generation of qualified, responsible, and capable market leaders.*

### **I. Program Overview**

California MBA's Future Leaders Program is an executive leadership development program that delivers a comprehensive curriculum for individuals who have demonstrated leadership interest and abilities. Participants enhance their skills through two academic/leadership training sessions (and virtual learning opportunities) provided by the Pepperdine University Executive Education Program, as well as additional educational opportunities through conferences provided by the California MBA.

Program participants will also be matched with a member of the California MBA Board of Directors, who will be an invaluable resource and mentor for the participant throughout the program year, making this a truly comprehensive leadership development experience.

### **II. Application Process**

California MBA member companies may nominate one employee to participate in the annual program, which includes **complimentary registration** for all California MBA events for that year, invitations to exclusive functions, participation in the Pepperdine University Executive Education Program and recognition upon the completion of the program. Once selected, candidates will choose a program track to participate in, either Residential or Commercial.

An employee of a California MBA member company in good standing shall submit an application which will include professional recommendations and general applicant information. The California MBA shall select up to 25 applicants to be invited to participate in the program. **All applications must be submitted by December 22, 2017.**

#### **Tuition**

Cost: \$2,200 if application is submitted by November 24, 2017

\$2,500 applications submitted after November 24, 2017

Payment is due by March 12, 2018. The tuition covers all conference registrations, the Pepperdine University Executive Education Program and participation in all California MBA events. The combined cost of these components well exceeds the program tuition, and the rich content and unique networking experience make the Future Leaders Program a truly remarkable value. **Note: Participating companies are responsible for the travel/lodging expenses of their employees.**



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### II. Program Content

#### Events

Program members are expected to attend several of the California MBA's events during the year and are invited to attend all California MBA events, on a complimentary basis (**conference registration waived**), for the year in which they participate. Included at each of the events are opportunities to attend business sessions and networking functions. Additionally, the California MBA will host an exclusive event for the program members at several of the events listed below:

#### Residential Track-Mandatory:

- California MBA Annual Legislative Day (March 12, 2018 | Sacramento, CA)
- Webinar (topic TBA) (April 10, 2018)
- Webinar (topic TBA) (May 8, 2018)
- Pepperdine University Executive Education Program, Session I (June 7-8, 2018 | Malibu, CA)
- 46<sup>th</sup> Annual Western Secondary Market Conference (July 16-18, 2018 | San Francisco, CA)
- Pepperdine University Executive Education Program, Session II (October 19, 2018 | Malibu, CA)
- California MBA Annual Board of Directors Retreat (November TBA, 2018 | Location TBA, CA)

#### Residential Track – Optional

- 23<sup>rd</sup> Annual Western States Loan Servicing & Technology Conference (August 5-7, 2018 | San Diego, CA)
- 21<sup>st</sup> Annual Western States Commercial Real Estate Finance Conf. (September 5-7, 2018 | Las Vegas, NV)
- Western States Legal Issues & Regulatory Compliance Conf. (December TBA, 2018 | Orange County, CA)

#### Commercial Track-Mandatory:

- California MBA Annual Legislative Day (March 12, 2018 | Sacramento, CA)
- Webinar (topic TBA) (April 10, 2018)
- Webinar (topic TBA) (May 8, 2018)
- Pepperdine University Executive Education Program, Session I (June 7-8, 2018 | Malibu, CA)
- 21<sup>st</sup> Annual Western States Commercial Real Estate Finance Conf. (September 5-7, 2018 | Las Vegas, NV)
- Pepperdine University Executive Education Program, Session II (October 19, 2018 | Malibu, CA)
- California MBA Annual Board of Directors Retreat (November TBA, 2018 | Location TBA, CA)

#### Commercial Track – Optional

- 46<sup>th</sup> Annual Western Secondary Market Conference (July 16-18, 2018 | San Francisco, CA)
- 23<sup>rd</sup> Annual Western States Loan Servicing & Technology Conference (August 5-7, 2018 | San Diego, CA)
- Western States Legal Issues & Regulatory Compliance Conf. (December TBA, 2018 | Orange County, CA)



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### Pepperdine University Executive Education Program



The Pepperdine University Executive Education Program provides hands-on sessions geared towards the behavioral elements of effective leadership. The cohort-style approach will establish a 'learning-team class culture' that will support and enhance transfer of learning throughout all sessions.

The program uses cutting-edge tools to enhance leadership skills, including the acclaimed Hogan Challenges assessment, which pinpoints specific attitudes, mind-sets, or behaviors which could delay or derail career advancement. This will provide a comprehensive look at the Future Leader's performance, and will form the basis of personal leadership development strategies.

The program consists of two parts:

- In-person sessions at Pepperdine University's Malibu campus. Here you will experience three (3) days of in-person leadership and academic training, beginning with a 1½-day intensive Leadership Workshop, plus a half-day Academic Workshop in June (2 days total), followed by a half-day Leadership Workshop and a half-day Academic Workshop in October (1 day total). Outcomes from the workshops will include: an assessment of each participant's opportunities for performance improvement and leadership development utilizing the *Hogan Challenges* Assessment tool, practical sessions establishing new habits and patterns of thinking and behavior, psycho-physiologically based tools for self-monitoring and self-assessment. The academic portion of the sessions are led by Dr. Abraham Park, Director of Fred Sands Institute of Real Estate; Associate Professor of Finance; and Department Chair of Accounting and Finance. Leadership/behavioral study portion is led by Dr. Julie Chesley, Associate Professor of Organization Theory and Management.
- Participants will also experience interactive group learning opportunities, including the group's final project, to be presented to the California MBA Board of Directors at the board's annual retreat in November. The groups will be provided private instruction and support (virtual) from Pepperdine University instructors on a variety of relevant topics, helping to broaden and deepen the student's understanding of today's marketplace.



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### **Conference Committees**

Participants will also be required **to serve on at least one (1) California MBA conference committee** during the year in which they participate in the program. Available committees consist of the following:

- Secondary Market (helps plan the annual Western Secondary Market Conference)
- Loan Servicing & Technology (helps plan the annual Western States Loan Servicing & Technology Conf.)
- Commercial (helps plan the annual Western States CREF Conference)
- Legal Issues (helps plan the annual Legal Issues & Regulatory Compliance Conference)

### **III. Program Benefits**

The Future Leaders Program provides networking and development opportunities that are priceless – but it also makes available a number of valuable events and tools for one remarkable price. The Future Leaders Program is designed to benefit the participating individuals, companies, as well as California MBA in the following ways:

*Participating Members:* The Future Leaders Program has evolved as a highly recognized program that enhances executive skills and provides an opportunity for participants to develop relationships that last an entire career. Members will have an exclusive opportunity to experience first-hand the educational and networking opportunities at California MBA conferences/events that would not normally be available to them. Because all California MBA events will be accessible, the program participants will have the unique chance to learn about different sectors of the real estate finance industry.

*Participating Companies:* Companies can expect to have their employee ready to take-on immense responsibility with higher levels of accountability. At the completion of the program, participating companies should find a much more well-rounded employee that is ready, willing and able to take a leadership role in the company.

*California MBA:* The Association will benefit by grooming future industry leaders that will not only reflect well on the industry at large, but will have a built-in connection with California MBA, thus helping to insure the continuation of Association leadership.



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### **IV. Testimonials**

*“The California MBA Future Leaders Program was an amazing experience. The program gave me a chance to network and learn with peers that have the same passion for our industry. The access to leadership education, Self-evaluation and industry leaders was invaluable! I strongly recommend this program to anyone.”*

John Pecoraro  
VP Secondary Marketing/Capital Markets  
Guild Mortgage Co.

*“The California MBA Future Leaders Program was one of most valuable experiences in my career. The opportunity to reflect on myself and to listen to others proved to be an invaluable learning experience for me, personally and professionally.”*

Tanya Coye  
Account Executive  
The Compliance Group, Inc.

*“I highly recommend the California MBA Future Leaders Program. I especially enjoyed the leadership development portion of the program. It was great learning with and working alongside similarly situated individuals who are aspiring to become leaders in our industry. I look forward to continuing to build upon what I learned from the program through continued involvement with the California MBA.”*

Andrew Boylan  
Chief Compliance Officer  
McCarthy Holthus, LLP





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Work Experience (please attach current resume)

\_\_\_\_\_  
Years in the real estate finance industry

\_\_\_\_\_  
Years with current employer

Please briefly describe your current job duties

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\*Please use additional pages if necessary\*

**Please complete the payment information below**

Check enclosed

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Mastercard

American Express

Credit Card # \_\_\_\_\_ Expiration Date: \_\_\_\_\_ CCV# \_\_\_\_\_

Signature: \_\_\_\_\_ Name on card: \_\_\_\_\_

Electronic Check Conversion NOTICE: When you provide a check as payment, you authorize us either to use information from your check to make a one-time electronic fund transfer from your account or to process the payment as a check transaction. Funds may be withdrawn from your account as soon as the same day and you will not receive the check back from your financial institution. If your payment is returned due to insufficient funds, you authorize us to make a one-time electronic fund transfer from your account to collect a fee of \$25 as allowed by state law.

**Please return via fax or email:**

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