

The Art of Secondary Mortgage Marketing

2003 SEMINAR SERIES

Federal Home Loan
 Bank Seattle

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2003 SEMINAR SERIES

The Art of Secondary Mortgage Marketing

Register Today!

The Art of Secondary Mortgage Marketing

An introduction to the “art” of secondary mortgage marketing and the benefits it offers your institution’s bottom line.

WHO SHOULD PARTICIPATE

Key decision-makers at your financial institution, including: senior loan managers, secondary marketing officers, mortgage lending officers, financial managers, chief financial officers, presidents, board members and others responsible for mortgage banking and financial management.

WHAT TO EXPECT

In this workshop, James M. Grashaw, CEO of Strategic Management Consultants, LLC, will introduce you to the process of secondary mortgage marketing and the benefits it offers your institution’s bottom line. With his 30 years of secondary mortgage marketing experience, Jim will guide you through the maze of secondary marketing, focusing on strategies for improving loan performance to minimize risk and maximize income. In addition, you’ll find out how to use today’s technologies to implement your secondary marketing strategies in a way that builds the confidence of your customers.

Join us to learn more about:

- The inherent risks and opportunities in the secondary market
- Using delivery options to hedge risks
- Maximizing sales execution
- Adequately staffing the secondary function
- Developing secondary policies and procedures
- Reporting, control and loan pricing

MPP BREAKOUT SESSION

(optional)

Seattle Bank account manager, Charlie Eiseman, will present the fundamentals of Federal Home Loan Bank of Seattle’s Mortgage Purchase Program (MPP) and how you can use it to maximize your mortgage banking business.

Guest Speakers

JAMES M. GRASHAW, CEO Strategic Management Consultants, LLC

James M. Grashaw is a senior financial services executive with over 30 years of successful leadership experience in the areas of lending and market risk. Since 1999, Jim has served as CEO of Strategic Management Consultants, LLC, (SMC) in Troy, Michigan. SMC specializes in helping middle-market mortgage lenders add significant value to their bottom lines through strategic planning and secondary marketing. SMC’s clients have improved their mortgage banking execution from between 75 to 110 basis points.

Prior to SMC, Jim served as senior secondary marketing officer at DMR Financial Services, Inc., a \$93-million institution, operating in 32 states. Jim directed mortgage trading and risk management, product development and shipping and document control. He has also served as: president of Towne Mortgage Company/AmeriCU, a mortgage origination and service center with a \$400-million servicing operation across four states; executive vice president and chief credit officer at Anchor Savings Bank, FSB, a \$33-billion financial institution located in Wayne, New Jersey; and executive vice president and senior loan officer at Northeast Savings, FSB, a \$7-billion financial institution located in Hartford Connecticut.

Jim has a B.A. in Accounting and Economics from Alma College in Michigan, and an M.B.A. in Marketing from Central Michigan University.

SEMINAR FORMAT

Each one-day workshop will be held from 9:00 to 3:00 p.m., with continental breakfast and lunch provided.

9:00 – 9:30 a.m.

9:30 – 11:30 a.m.

11:30 a.m. – 12:30 p.m.

12:30 – 3:00 p.m.

3:00 – 4:00 p.m.

Continental Breakfast & Registration

The Art of Secondary Marketing, Part 1

Lunch

The Art of Secondary Marketing, Part 2

MPP Break-out Session (optional)

Business casual clothing is appropriate.

Registration

Please provide the following information:

Name _____

Name _____

Name _____

Institution name _____

Web address _____

Address _____

City/State/Zip _____

Email _____

Phone _____ Fax _____

Payment method:

Check. Please mail to: Federal Home Loan Bank of Seattle, 1501 Fourth Avenue, Ste. 1900, Seattle, WA 98101-1693, Attn: Katherine Nordstrom

Debit my DDA # _____

Amount _____

Customer # _____

Authorized Signature _____

Note: Registration fees are non-refundable, but substitutions are permitted.

Registration fee: \$60.00 per person. To register, please complete and fax this registration form to:

206.340.8711
Attn: Katherine Nordstrom
206.340.2312 or
800.973.6223 ext. 2312
katherinen@fhlbsea.com

Please select seminar date:

March 31, The Davenport Hotel
10 South Post Street
Spokane, WA 98201
509.455.8888

April 2, The Benson Hotel
309 Southwest Broadway
Portland, OR 97205
503.228.2000

April 4, Mayflower Park Hotel
405 Olive Way
Seattle, WA 98101
800.426.5100

April 15, Holiday Inn Bozeman
5 Baxter Lane
Bozeman, MT 59715
406.587.4561

April 17, Grand America Hotel
555 South Main Street
Salt Lake City, UT 84111
801.258.6000

Lending Strength™

At the Federal Home Loan Bank of Seattle, our mission is to build financial partnerships that enhance our members’ success and make our communities better places to work and live. We do this by Lending Strength to our members – helping them bring financial opportunities to life so that they can more effectively support and invest in their communities.