

TEXAS
HOME &
MORTGAGE 

Texas Home &
Mortgage Symposium

2018

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Welcome to the 2018 Texas Home & Mortgage Symposium

The Texas Land Developers Association, in conjunction with the Seller Finance Coalition, is pleased to welcome you to our inaugural event, with developers, seller financiers of homes and land, loan originators and servicers, title professionals, banks, and service providers from across the state.

We have a dynamic two days planned with content-rich presentations and discussions on issues related to the industry – both state and national – and what to expect in the upcoming 86th Texas Legislative Session, including the regulation and enforcement of state statutes, rules, and policies related to the mortgage lending environment. As the regulatory policies continue to evolve for this industry, it is increasingly important for our industry to have a seat at the table and be aware of what is going on at both the state and national levels. We've had great success federally with efforts to amend the Dodd-Frank Act, but without a strong voice of broad support at the state level, these efforts are for naught.

That's where you come in. You are on the front lines, providing homes for fellow Texans; opening doors of opportunity that were previously closed; and creating homeowners out of hard workers. The Texas Land Developers Association and the Seller Finance Coalition are making a difference in the lives of so many; yet there are so many more whose lives we can positively touch, through our legislative advocacy and influence with policymakers and regulators, both in Austin and in D.C.

We hope you enjoy your time here in Austin, learning from key stakeholders and legislators, and networking with colleagues and peers. And if you're not a member of these organizations, we hope you will consider joining and become a part of our collective voice in our state and nation's capitals. Thank you again for your presence; and for your support and commitment to the dream of homeownership in Texas.

Best regards,

Paul Daniec
TLDA President

The **Texas Land Developers Association** is a statewide trade organization providing necessary information to comply with regulations concerning seller financed transactions and loan servicing. Our members have substantial experience and help each other by pooling information.

TLDA maintains a professional lobbying presence in Austin at the legislature and before state agencies, with experience and expertise involving water rights, water availability, and endangered species issues. TLDA members and staff can provide assistance in limiting city, county and state efforts to expand ordinance-making authority.

Our members and staff provide information and implement initiatives involving the Texas Finance Commission, Texas Department of Savings and Mortgage Lending, and at the federal level, the Consumer Financial Protection Bureau.

Board of Directors:

Paul Daniec, President	Richard Ruppert
Krys Weyand, Vice President	Kyndel Bennett
Nellie Woodward, Secretary	John Womack
Scot Campbell, Treasurer	Jack McClelland
Tony Gray, Immediate Past President	John Harris
Tillmin Welch	Richard Garza

The **Seller Finance Coalition** was formed to advance the interest of the Seller Finance industry and to educate lawmakers about the detrimental impact of current law. Founding members of the SFC include Glenn Lee of Texas Funding Corp., Bob Repass of Colonial Funding Group LLC, Eddie Speed of NoteSchool, LLC, Scot Campbell of S.R. Campbell Properties, and Doug Smith of My House Deals. In 2015, the National Real Estate Investors Association (NaREIA) joined as our largest member, bringing with it over 40,000 members nationwide. These individuals and small companies specialize in the creation of seller financed mortgage notes. Our members may be investors, re-habbers, note buyers, small developers and other small businesses. They fill a very important niche in the market by seller financing properties that would otherwise be difficult and expensive to finance through conventional mortgage sources. Most work from a small office or even a home office, and maintain a good relationship with their customers and the communities that they work in.

Board of Directors

Glenn Lee
Scot Campbell
Bob Repass
Eddie Speed
Charles Tassell
Jeffrey Watson

- 10:00 am Registration Opens**
Intercontinental Stephen F. Austin Hotel
- 11:30-1:00 pm Welcome Luncheon**
Austin Club
Paul Daniec, Benchmark Utility Contracts & TLDA President
Harvey Kronberg, Editor, Quorum Report
Chairman Todd Hunter, State Representative
Invocation by: Tillmin Welch, Buena Tiera Development & TLDA Executive
- 1:30-2:15 pm Panel Discussion: Advocacy 101**
Austin Club
Introduction by: Scot Campbell, SRC Management & TLDA Executive Member
Moderated by: Jenifer Sarver, Sarver Strategies
Chuck Rice, Texas lobbyist, The Chuck Rice Group
Matt Keelen, DC lobbyist, The Keelen Group
Wayne T. Franke, state and federal lobbyist, MWJT Consulting
Steve Ray, Texas lobbyist, Steve Ray Associates
- 2:15-3:00 pm Panel Discussion: Making the Case**
Austin Club
Introduction by: Krys Weyand, Mano Santa, LLC & TLDA Executive Member
Jason Ray, Ray & Riggs PC
John Fleming, General Counsel, Texas Mortgage Bankers Association
- 3:00-3:45 pm Q&A with Commissioner Caroline Jones, Texas Dept. of Savings & Mortgage Lending**
Austin Club
Introduction by: John Womack, Lantana Services PLLC & TLDA Executive Member
Moderated by: Emily Ramshaw, Editor-in-Chief, Texas Tribune
- Break Optional Capitol Tours**
- 5:30-6:30 pm VIP Reception (Sponsors & Speakers Only)**
Lt. Governor's Reception Room, State Capitol
- 7:00-10:00 pm Round Table Dinners (Sponsors Only)**
Various restaurants
Hosted by TLDA members

- 7:30-9:00 am Sponsor Shark Tank & Networking Breakfast**
Intercontinental Stephen F. Austin Hotel
Introduction by: Tony Gray, Stonehaven Development & TLDA Executive Member
Moderated by: Karina Kling, Anchor, Capitol Report/Spectrum News
- 9:30-10:15 pm General Assembly Keynote: The Power of Unity**
Austin Club
Introduction by: Glenn Lee, Texas Funding & SFC Founding Member
Eddie Speed, Note School & Colonial Funding
- 10:30-11:30 pm Legislator Roundtable**
Austin Club
Introduction by: Jack McClelland, Gentry Capital LLC & TLDA Executive Member
Moderated by: R.G. Ratcliffe, Texas Monthly
Sen. Charles Perry
Rep. Garnet Coleman
Rep. Ryan Guillen
Rep. Dan Flynn
- 11:30-12:00 pm Keynote Address: County Compliance & Governance Issues**
Austin Club
Introduction by: Jack McClellan, Gentry Capital LLC & TLDA Executive Member
Leonard Smith, Attorney At Law
- 12:00-1:30 pm Legislative Champion Luncheon & Closing Keynote: The New Tax Legislation: Implications on the Industry**
Austin Club
Introduction by: Kyndel Bennett, Cayetano Development & TLDA Executive Member
Marco Longoria, Branscomb PC
- 2:00-2:45 pm Break-out Session #1**
Austin Club
Bob Repass: The Cornerstones of a Successful Entrepreneur
Glenn Lee: Lessons from the Industry
- 2:45-3:30 pm Break-out Session #2**
Austin Club
David Roberts: Insuring your Assets
Roberta Hurdy: Alternative Asset Investing - Leveraging Self-Directed IRAs
Mitch Stephen: The Art of Owner Finance

Advocacy 101: Learn how your voice matters. A conversation with our seasoned lobby team on the importance of grassroots advocacy in and out of the legislative and congressional sessions. Chuck Rice, Matt Keelen, Wayne T. Franke, and Steve Ray bring nearly a century of advocacy experience collectively, and Jenifer Sarver is a master messaging strategist from DC and Texas. Hear their lessons and advice on how your voice can be heard.

Making the Case: They say the devil is in the details. These attorneys make sure the i's are dotted and t's are crossed in each of their respective roles – whether representing the agency, the industry, or the financial side. Jason Ray, and John Fleming will present each stakeholder's legal perspective in light of rules and regulations governing the industry.

Q&A with Commissioner Caroline Jones: The Texas Department of Savings and Mortgage Lending is the governing agency for the industry at the state level. Caroline Jones celebrates her 10th anniversary with the agency, and was named Commissioner in 2014. Texas Tribune Editor-in-Chief Emily Ramshaw sits down with the Commissioner for an in-depth interview on the agency's role in regulating the industry.

Sponsor Shark Tank: Our exhibitors present a lightning-round pitch, representing all aspects of the industry, from note originators and loan services, to traditional banks and IRAs. Enjoy breakfast while you hear first-hand from these experts in the field on how they can help you succeed in your business.

Keynote: The Power of Unity, with Eddie Speed: This presentation will lay out the unity between the Texas Land Developers Association and the Seller Finance Coalition as well as all the industry players with them, moving from an independent group of real estate entrepreneurs, to finding the power in their unity by working together through compliance and legislative issues to better their business for all.

Legislator Round Table: Texas Monthly's chief political writer and Capitol Press Corps veteran R.G. Ratcliffe moderates a panel of state legislators from across the state. These policy-makers serve on committees which create and vet policies relating to industry regulations and state statutes.

County Compliance & Governance Issues with Leonard Smith: For over 30 years, Leonard Smith has successfully represented clients before courts, city councils and commissions, the Texas Legislature, and state agencies. Having worked as a city attorney for more than a decade, Leonard knows local government inside and out, and has been a partner in representing industry stakeholders at the county level.

Legislative Champion Luncheon & Keynote: Celebrate our legislative champion with our inaugural honoree during this closing lunch, then hear from preeminent tax attorney Marco Longoria with Branscomb PC regarding the recently passed federal tax legislation and how it affects your business.

Bob Repass: The Cornerstones of a Successful Entrepreneur: What four characteristics do you need to be a successful real estate entrepreneur? In this session Bob will detail the cornerstones he has used throughout his 30 year career in seller financing and the discounted note space to run successful companies.

Glenn Lee: Lessons from the Industry: Hear from industry veteran Glenn Lee, the lessons he has learned in his 47 years in the real estate business, having purchased his first house at age 17. He's a leader in the seller finance industry and founder of Texas Funding Corporation, specializing in mortgage note purchases, hard money loans and investment in various types of real estate. He's a wealth of information and a founding member of the Seller Finance Coalition, lobbying in Washington on the Dodd-Frank bill.

David Roberts: Insuring your Assets: Dave Roberts is VP of Sales for JB Lloyd & Associates, a division of US Risk, with more than 25 years in the insurance industry specializing in covering distressed assets. Learn about coverage for vacant, foreclosed and occupied properties as well as coverage for note investors.

Roberta Hudy: Alternative Asset Investing - Leveraging Self-Directed IRAs: Self-Directed IRA/401(k) investing, although widely misunderstood and underutilized, allows investors to architect a diversification strategy with assets often not found in traditional asset allocation models. Assets including, but not limited to, real estate, mortgage notes and trust deeds, small businesses, joint ventures, private equity, and precious metals. Roberta offers a comprehensive self-directed IRA/401(k) educational program, providing useful tools, resources, and insight into the methods used by Equity Trust's 130,000+ clients. The tactics discussed will demonstrate methods to potentially eliminate capital gains tax and ordinary income taxes within your real estate and or alternative investment assets through tax-advantaged retirement accounts.

Mitch Stephen: The Art of Owner Finance: Mitch Stephen began in the real estate industry with a wholesaling and "fix & flip" approach. He soon transitioned into a "buy & hold" strategy, and through a long strain of trial and errors, perfected the art of owner financing, doing more than 100 deals per year, resulting in over 1500 properties bought and sold in and around San Antonio since 1996. Learn from his experience and pick up tricks of the trade with his step by step instructions on how to owner finance.

Speakers



Harvey Kronberg

Veteran Capitol reporter Harvey Kronberg began his career in Texas politics as a contract writer for the Quorum Report in 1989. The publication was founded in 1983 and is Texas' oldest political insiders newsletter. Over the years Kronberg established a reputation for analysis and a real world view of the backrooms of Texas politics and government. Former Lt. Gov. and Texas icon Bob Bullock called Kronberg "the Capitol's most astute observer." In 1998, Kronberg bought Quorum Report, and within a matter of months, he pioneered online political publishing capturing national attention. What was once a biweekly publication was transformed into a political powerhouse, publishing breaking news in real time. In 2005, Texas Monthly declared Kronberg one of the 25 most powerful people in Texas politics.



Todd Hunter

Representative Todd Hunter is serving his 9th term in the Texas House of Representatives. He serves as Chairman of the Calendars Committee and Vice-Chairman of the Criminal Jurisprudence Committee. He was also a member of the County Affairs Committee. During his previous tenure in the Texas House (1989-1997), Todd served on the Civil Practices Committee as its Chairman, the State Affairs Committee as Vice Chairman, and on the Appropriations Committee as the Chairman of the Education Sub-Committee. He also served as a member of the Ways and Means, Elections, Calendars, Urban Affairs, and Higher Education Committees. Hunter has practiced law since November 1978 and is currently a partner of Hunter, Barker & Fancher, L.L.P. in Corpus Christi.



Jennifer Sarver

Jenifer Sarver is a small business owner in Austin, Texas, with a career spanning the corporate, academic and political worlds. She was a senior staff member for U.S. Senator Kay Bailey Hutchison, a time she calls her "Ph.D. in Texas," where she was steeped in the State's history, people and geography. Jenifer served as Executive Director of the Archer Center, the academic home of The University of Texas System in Washington, D.C., started by Former U.S. Congressman Bill Archer, and was later appointed by the Bush Administration to the U.S. Department of Commerce, working with Secretary Carlos Gutierrez, managing communication issues ranging from international trade to the digital television transition. In 2009, she moved back to Texas as Chief of Staff to Ambassador Karen Hughes, worldwide vice chair of Burson-Marsteller. She now runs Sarver Strategies, a communications strategy firm, specializing in storytelling to convey a message.



Chuck Rice

Chuck Rice has more than 40 years experience representing a wide variety of clients, providing research and advocacy services in matters of environmental affairs, water, municipality issues, waste management, land development and transportation issues. Chuck also has experience as VP for Legislative Affairs for a State Association and spent time on staff in the Texas Senate, Texas House of Representatives, and in the executive branch, having worked for the Secretary of State. Especially as pertaining to clients involved in real estate development and construction, he has been effective in areas involving the procurement and approval of properties for roadways, then moving forward through construction aspects which involve coordination and lobbying at state agencies and the legislature as well. In addition, he has helped developers get approval for their projects at all levels of government.

Speakers



Matt Keelen

Matt Keelen, founder and President of the government affairs firm The Keelen Group (TKG), is a widely known and highly regarded lobbyist & political strategist with over twenty years' experience. Bloomberg Government Affairs rated the Keelen Group fourth in their 2015 rating of top performing lobbying firms in the nation. Acknowledged for his innate ability to establish and develop long lasting political relationships, Keelen has dozens of time-tested relationships with Members of Congress, including many who are in positions of considerable influence today. Currently there are over twenty-five members serving in the House and Senate that Keelen assisted in getting onto Capitol Hill, along with two Republican governors.



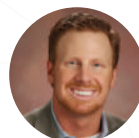
Wayne T. Franke

Wayne T. Franke is the owner of MJWT Consulting, a political and marketing company located in Austin. He is also a founding partner in Business Partners, Ltd, a political and business development consulting firm located in Austin. Prior to starting and owning MJWT and being a partner in Business Partners, Ltd, Wayne began his career with GTE while attending college at ASU and spent 29.5 years with the company until he retired in February of 1998. At GTE, Wayne served in numerous positions in the Engineering, Marketing, and Government Affairs Departments. His last 23 years with GTE were spent in Government Affairs, and during the last 12, he headed up GTE's Lobby Team in Austin.



Steve Ray

Steve Ray has a strong background in communications, politics, government and economic development. A well-known author and journalist, Ray won numerous journalism awards over a 25-year newspaper career that included stints at the San Antonio Express News, the Corpus Christi Caller Times and other weekly and daily publications. He retired from journalism as the Capitol Bureau Chief for Scripps Newspapers in Austin, after which, he served as Deputy Executive Director for Information and Planning at the Texas Department of Economic Development Gov. George W. Bush administration. He later formed his own governmental affairs and consulting firm, where he continues to be actively involved with advocacy and surveying projects with local governments, corporations, and nonprofits across the state.



Jason Ray

Jason Ray is a board certified administrative attorney licensed in the US. District Court for the Western District. He is a shareholder with Riggs & Ray, PC, and has nearly 20 years experience in appellate work. Previously, he served as Chief Committee Clerk for the Texas House Committee on Public Safety, after working as a legislative aide to U.S. Congressman Bill Sarpalius in Washington, D.C. He has additional experience as a litigation attorney for the Texas Department of Public Safety. Prior to going into private practice, he served as Assistant Attorney General for the Administrative Law Division of the Texas Office of the Attorney General. Jason has been TLDA counsel on financial regulation under State law for the past 5 years, helping navigate the new waters of residential mortgage law with all its aspects since the passage of Dodd-Frank.

Speakers



John Fleming

John Fleming is General Counsel of the Texas Mortgage Bankers Association. He is a former director of the Texas Association of Bank Counsel, and practices in the area of banking, mortgage banking, financial services, regulatory and administrative law, commercial litigation, and arbitration. His clients include banks, thrift institutions, mortgage banks, life insurance companies, investment advisers, and securities firms. Prior to joining Hays & Owens, Mr. Fleming served four years as General Counsel to the TX Dept of Savings & Mortgage Lending which oversees and regulates state chartered thrift institutions, mortgage brokers, and mortgage bankers. He is an adjunct professor at the University of Texas School of Law and a frequent speaker on arbitration, banking, and mortgage law topics. He is admitted to practice by the Supreme Court of Texas and the Northern and Eastern Districts of Texas.



Emily Ramshaw

Emily Ramshaw is editor-in-chief of The Texas Tribune. Under her leadership, the Tribune has won a Peabody Award, nine national Edward R. Murrow Awards, IRE's Gannett Award for Innovation in Watchdog Journalism and eight honors from the Online News Association. Before coming aboard as one of the Tribune's original reporters, Ramshaw spent six years at The Dallas Morning News, where she broke national stories about sexual abuse inside Texas' youth lock-ups, reported from inside a West Texas polygamist compound, uncovered "fight clubs" inside state institutions for the disabled and investigated a series of deadly transplants where patients received rabies-tainted organs. The Texas APME named Ramshaw its 2008 Star Reporter of the Year. Ramshaw serves on the board of the Pulitzer Prize.



Caroline C. Jones

Caroline C. Jones is Commissioner of the Texas Department of Savings and Mortgage Lending. She joined the Department in March 2008, and was appointed Commissioner June 1, 2014. Caroline currently serves as the Board Chair of the American Council of State Savings Supervisors, and is a member of the Federal Financial Institutions Examination Council (FFIEC) State Liaison Committee (SLC). Her previous experience includes serving as in-house counsel at Guaranty Bank, and in-house counsel at the Farm Credit Bank of Texas. Her main area of practice has been residential mortgage lending. Caroline received her undergraduate degree from Sophie Newcomb College of Tulane University and her law degree from St. Mary's University School of Law. She is a graduate of the Governor's Executive Development Program through the Lyndon B. Johnson School of Public Affairs. She is also a graduate of Leadership Austin.



Karina Kling

Karina Kling is the Capital Tonight Anchor for Spectrum News. Before that she served as the senior political reporter from 2009 to 2015. While in Austin, she's covered four legislative sessions and numerous campaigns. Karina also helped launch Capital Tonight. She received the 2012 Texas AP Broadcast award for Best Spot News Story and Capital Tonight has twice been nominated for a Lone Star Emmy. Karina earned her master's degree in broadcast journalism from Syracuse University's Newhouse School. A Midwest native, she grew up in Sterling, Kansas and graduated with honors from Hastings College, Hastings, Nebraska. She earned a double major in media production and vocal music performance. Before heading south, Karina was a reporter/anchor at KOLN/KGIN in Lincoln, Nebraska.

Speakers



Glenn Lee

J. Glenn Lee is owner of Texas Funding Corporation, a mortgage investment firm based in Houston, Texas. Through this and other entities he specializes in mortgage note purchases, hard money loans and investment in various types of Real Estate. Considering that he purchased his first house at the age of 17 he has 47 years of experience in real estate related business. He has a BS degree in business from the University of Southern Mississippi. He has served on the board of Texas Association of Business, Stevens and Pruett Foundation for Children and Animals, University of Houston Bauer School of Real Estate and the Commercial Real Estate Network. He is a co-founder of the Seller Finance Coalition. He lives in Katy, Texas with his wife Cindy. They have three children and four grandchildren.



Eddie Speed

Since 1980, W. Eddie Speed has dedicated his professional life to the seller financing and non-performing note industry. Over the years, he has introduced innovative ideas and strategies that have positively impacted the way the industry operates today. Eddie founded NoteSchool, a highly recognized training company specializing in the teaching of buying both performing and non-performing discounted mortgage notes. He is the owner and president of Colonial Funding Group LLC, which acquires and brokers discounted real estate secured notes. In addition, he is also a principal in a family of Private Equity funds that acquires bulk portfolios of notes. He has been a leader and innovator in the Note Business for over 30 years.



R.G. Ratcliffe

R.G. Ratcliffe is the political editor of Texas Monthly. He has covered state government, as well as state and national politics since 1983. He also has covered multiple natural disasters, and survived a 7.5 earthquake in Mexico while reporting on an even greater one that occurred several days before that leveled Mexico City. As a young reporter in Florida and Georgia, Ratcliffe wrote about civil rights protests, Ku Klux Klan activity, the cocaine cowboy wars, and the trial of serial killer Ted Bundy for the murder of two Florida State University sorority sisters. A Texas native, he spent 25 years with the Houston Chronicle in their Capitol Bureau. His early reporting days were spent at The Florida Times-Union and the Fort Worth Star Telegram. He is currently working on a couple books – one on politics and another on the first Medal of Honor winner from Texas, a man born a slave who won the medal fighting for freedom.



Charles Perry

Charles Perry, a practicing CPA from Lubbock, was elected to the Texas Senate in 2014 after first serving two terms in the Texas House of Representatives. A life-long West Texan, Perry is a conservative fighting for lower taxes, better schools, safer communities, and individual liberties. He currently chairs the Senate Committee on Agriculture, Water, & Rural Affairs. He was the first freshman to receive a chairmanship in the Texas Senate since 1993. He also sits on the Senate Committees for Criminal Justice, Health and Human Services, and Transportation. Perry fought to pass economic development programs for rural communities, improve our water laws, cut red tape that will allow a new VA health care clinic to be built in West Texas, and reformed healthcare laws that will increase access to medicine via telepharmacy.

Speakers



Garnet Coleman

Garnet F. Coleman has served the people of District 147 in the Texas House of Representatives continuously since 1991. Representative Coleman has earned a reputation as a diligent leader in the areas of health care, economic development and education. He is currently the Senior ranking member of the Public Health Committee as well as the Chairman of the County Affairs Committee. Representative Coleman also serves as a member of the Select Committee on Federal Economic Stabilization Funding, which is charged with ensuring that the state maximize its share of funds under the American Recovery and Reinvestment Act. Coleman has been instrumental in passing legislation fostering urban redevelopment, authored legislation allowing the creation of a commercial and industrial development zone in Harris County, designed to promote economic development along the transportation corridors that link Houston-area transportation nodes.



Ryan Guillen

Ryan Guillen is 6th generation South Texas rancher, family man, business man, guardsman, and former Ag teacher known for passing more legislation than any other State Representative in the last decade, he's been named "Best Legislator" and "Legislator Of The Year" by nearly a dozen organizations. This year, Capitol Inside called him a "House Bill Machine," and a "one-person assembly line for legislation." Elected to the State House in 2002, he's now serving his sixth term in the Texas House of Representatives where he represents District 31 encompassing 10 counties in South Texas He currently serves on the Committee on Licensing & Administrative Procedures and as Chair of the Culture, Recreation & Tourism Committee which oversees parks, wildlife, fisheries, libraries, historical landmarks, the arts, tourism, and Texas's image and heritage.



Dan Flynn

Dan Flynn is in his sixth term representing House District 2 in the Texas House of Representatives, where he has gained a reputation as a strong fighter for the values of limited government, fiscal responsibility, and family values. In 2013, Representative Flynn was named East Texas Legislator of the Year for his principled conservative leadership. Throughout his years of public service in the Texas House of Representatives, Representative Flynn has never voted for a bill to raise taxes, and Texans for Fiscal Responsibility has named him a Texas Taxpayer Hero, citing him for always seeking to reduce the burden of taxes, looking for smarter ways to spend tax dollars, and working to make the budget process more transparent and accountable.



Leonard Smith

For over 30 years, Leonard Smith has successfully represented clients before courts, city councils and commissions, the Texas Legislature, and state agencies. With more than a decade of public service as a city attorney, Leonard has advocated for both private and public clients in these arenas. His experience and background enable him to assist individuals, businesses, associations, and local governments in navigating a wide array of complex problems, with an emphasis on formulating practical, cost-effective solutions. Over his career, Leonard has proudly represented a wide array of clients, including individuals and small businesses, municipalities, and several of the largest corporations in the country.

Speakers



Marco Longoria

Marco Longoria advises and counsels clients on a broad range of complex tax issues. His practice focuses on federal, state and local tax planning and tax controversy matters. Marco frequently advises clients on the tax-related aspects of business formations, mergers and acquisitions, reorganizations and closely-held businesses. He also advises and counsels clients with respect to federal and state tax audits, initiates refund claims and contests tax adjustments. He has three times been named a Texas Rising Star by Texas Monthly and Texas Super Lawyers. Additionally, he is managing editor of the Houston Journal of International Law, and is licensed to practice in both Texas and the United States Tax Court. He has worked as a briefing attorney in the 13th Court of Appeals and was named to the Corpus Christi Top 40 Under 40.



Bob Repass

Bob Repass is a 28-year veteran and expert in the seller finance discounted mortgage and distressed asset industry. Over the course of his career, he has purchased over 40,000 performing and non-performing mortgage loans totaling over \$2 billion dollars in volume, giving him an unparalleled track record in the industry. During his career in the seller finance note industry he was a Senior Executive at the largest institutional investors; Metropolitan Mortgage & Securities, Associates Financial Services and Bayview Financial. Mr. Repass serves as Managing Director of Colonial Funding Group and NoteSchool, where he has overall responsibility for the management of the firm. In addition, Mr. Repass is the Fund Manager - Chief Investment Officer of Colonial Capital Management's Colonial Fund 17 and Colonial Impact Fund II.



Dave Roberts

Dave Roberts is Vice President of Sales for JB Lloyd & Associates, a division of US Risk. He has over 25 years in the insurance industry with a specialty in covering distressed assets. His emphasis is in the real estate investor space with coverage provided for vacant, foreclosed and occupied properties as well as coverage for note investors. JB Lloyd & Associates also provides coverage for loan and note servicers that allows investors to get better pricing and coverage as part of the servicing agreement instead of attempting to buy coverage on individual properties. J.B. Lloyd & Associates, LLC is a full-service insurance team specializing in solutions for the financial services industry. It was founded in 1988 by President James B. Lloyd to provide the kind of specialty insurance products, combined with the highest standards of customer service he knew the financial, mortgage broker, personal lines and banking industries needed.



Roberta Hudy

Roberta Hudy is one of Equity Trust's National Brand Ambassadors who helps educate investors about the potential benefits of self-directed investing at Equity Trust Company. Roberta brings both educational training expertise and understanding of small business ownership in the construction industry, tax advantaged retirement accounts, and new business development strategies. Roberta brings "real world" experience to the SDIRA educational events, making content easy to understand. She is a relationship builder, and relatable professional with professional affiliations with Urban Land Institute and the Council of Smaller Enterprises. Roberta is passionate about real estate, networking, and providing education to our communities. As A National Brand Ambassador for Equity Trust, Roberta presents educational seminars to those interested in self-directed IRAs. Equity Trust offers educational curriculum about investing with your self-directed IRA in alternative investments.

Speakers



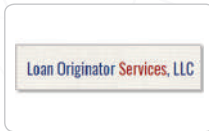
Mitch Stephen

Mitch Stephen has been a self-employed RE investor for 20+ years. His real estate investing career started at the age of 23 when he read "Nothing Down" by Robert Allen. Mitch, together with his wife, Tommi, and his daughter, Shannon purchased their fair share of local homes. Their company, Independence Day, Inc., has bought and sold over 1,500 properties in and about San Antonio, since 1996. This company specializes in buying distressed properties with OPM and selling those properties with Owner Financing. The Stephen family built wealth by purchasing very affordable homes, selling them for double the cost, and owner financing the sale by creating a note to their buyer. He is the author of three books.

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