



## Join Us

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## Texas Home & Mortgage Symposium **2019**

*Protect your right to buy, sell, and use your property.*

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*Making homeowners out of hardworking Texans.*

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## Speakers



### 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.



### Jenifer 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 communications on 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.



### Dave Shaw

With more than two decades of communications and marketing experience, Dave is an established expert in his field, delivering masterful vision, insight and creativity to every project at Arrow.

Prior to launching his own agency, Dave was vice president at TateAustin; previously, he worked with Temerlin McClain and Public Strategies, Inc. Dave has produced winning work for many major brands over the years, including Southwest Airlines, AT&T and H-E-B.

Dave is an often-sought speaker and panelist for industry events nationwide. Closer to home, he is well-known for his community work; Dave currently serves as a board member for the Texas Book Festival, as a Fellow of the British-American Project, and as president of the Texas Lyceum.

## Speakers



### 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.



### Stephen Borg

Stephen A. Borg joined The Keelen Group, LLC, as Vice President in July of 2011 after more than 10 years on Capitol Hill working for Congressman Timothy V. Johnson, a member of the House Transportation and Infrastructure Committee and the House Agriculture Committee for 5 terms. Prior to working on Capitol Hill, Stephen worked as a member of the Republican House Research Staff in the State Capitol of Illinois. During his time on Capitol Hill, Stephen handled a portfolio of policy issues including Appropriations, Healthcare, Taxes, Education, Science, and the Budget. While at The Keelen Group, Stephen has established robust government relations programs and serves as the chief Washington, DC, representative for large companies, trade associations, and numerous diverse clients.



### 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.

## Welcome to the 2019

## Texas Home & Mortgage Symposium

The Texas Land Developers Association, in conjunction with the Seller Finance Coalition, is pleased to welcome developers, seller financiers of homes and land, loan originators and servicers, title professionals, banks, and service providers from across the state. Welcome to the 86th legislature!

We have a **dynamic two days planned with content-rich presentations and discussions** on issues related to the industry – both state and national – and up to them minute updates on what’s happening just up the street, under the dome; including the **regulation and enforcement of state statutes, rules, and policies related to land use, and 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 – you can join both organizations by becoming a member of the **Texas 100** – 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



## About Texas Home & Mortgage

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 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  
Krys Weyand, Vice President  
Nellie Woodward, Secretary  
Scot Campbell, Treasurer  
Tony Gray, Immediate Past President  
Tillmin Welch

Richard Ruppert  
Kyndel Bennett  
John Womack  
Jack McClelland  
John Harris  
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

## Speakers



### Drew Springer

Representative Drew Springer, R-Muenster, fights to preserve rural values, promote economic development, and undue burdensome regulations in Texas. He is adamant in his belief that the government has become too large at both the federal, state, and local level. Excessive regulations overburden our lives, destroy our freedoms, create a nanny state, slows our growth, and increase the cost of living. In Drew's opinion, the government does not have a revenue problem but a spending problem. After graduating from Weatherford High School, Drew attended and graduated from the University of North Texas with a Bachelor's degree in accounting. He spent fifteen years working in Texas for a railcar company as an accountant, leasing VP, and eventually president overseeing three divisions. In his role as president, Drew had over 1,000 employees working under him and made the company hundreds of millions in sales. He left to join his father's financial services business where he has specialized in agricultural managed futures for the last twelve years. He and his wife Lydia, have been married for 25 years, and have 3 children.



### Commissioner Caroline 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.



### Florence Shapiro

Florence Shapiro is a public policy consultant, with ShapiroLinn Strategic Consulting. A former State Senator, Shapiro is best known for her work in regional mobility, setting accountability standards for public education, and for protecting children from sexual predators. Many of the Texas laws Shapiro authored have been duplicated in other state legislatures and in Congress. Shapiro has been a teacher, a small business owner, a volunteer, a board chairman, and President and Founder of such groups as the Collin County Junior League and the Information & Referral Center of Collin County receiving over 250 awards for her public service. Shapiro spent 9 years as Chair of the Senate Education Committee during a distinguished 19-year career as a leader in the Texas State Senate. Prior to the Texas Senate, Shapiro spent six terms on the Plano City Council, served as the Mayor of Plano, and President of the Texas.

## Speakers



### Garnet Coleman

Garnet F. Coleman has served the people of District 147 in the Texas House of Representatives continuously since 1991. Throughout his years of service, 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. Striving to increase economic development in Texas, Rep. 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.



### Representative Ryan Guillen

A 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.



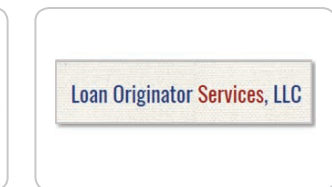
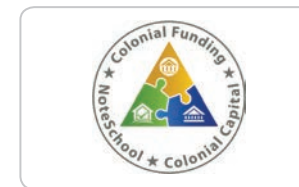
### Todd Hunter

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.

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- 10 -10:45 a.m. Opening Session**  
*Stephen F. Austin Hotel*

Legislative Overview with Evan Smith & Ross Ramsey of the Texas Tribune
- 11-11:30 a.m. Keynote Remarks**  
*Stephen F. Austin Hotel*

Railroad Commissioner Christi Craddick
- 11:45 a.m.-1 p.m. Keynote Luncheon: State of Texas Real Estate Industry**  
*Stephen F. Austin Hotel*

Gary Maler, Director, Texas A&M Real Estate Center
- 1:15-1:45 p.m. Speaker**  
*Stephen F. Austin Hotel*

Eddie Speed, Colonial Funding
- 2-2:45 p.m. Federal Tax Plan**  
*Stephen F. Austin Hotel*

Marco Longoria, Branscomb PC
- 3-3:30 p.m. New Development Opportunities**  
*Stephen F. Austin Hotel*

Historic Tax Credits & Opportunity Zones Panel: Moderated by Craig Casselberry, with Haley Wilcox, Ogee LLC & Dub Sutherland, Kennedy Sutherland
- 3:45-4:15 p.m. Self-directed IRAs**  
*Stephen F. Austin Hotel*

Nathan Long, Quest Trust
- 4:30-5:30 BREAK**
- 6-7 p.m. VIP Reception**  
*Austin Club*

Speakers, Sponsors & Elected Officials



**Nathan Long**

As the CEO of Quest Trust Company, Nathan Long oversees the operations of the company and aids in improving the practices implemented. After joining his brother, Quincy and the Quest Trust Company team in 2007, Nathan has aided in growing the company to over ninety employees located in four different cities, with continued expansion expected in the near future. Prior to working at Quest Trust Company, Nathan was in the automotive industry for over 17 years as an upper level executive for Automotive Investment Group, AIG, and participated in growing the ABC Nissan Branch in Phoenix, Arizona. Nathan also holds the title of Certified IRA Services Professional (CISP), from the Institute of Certified Bankers. Throughout his time with Quest, Nathan has focused his time and efforts on providing superb customer service and developing excellent educational resources.



**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.



**Senator 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



### Craig Casselberry

Craig Casselberry has spent twenty-five years advising two Texas Governors, public officials, companies, and organizations in the areas of public affairs, government relations, strategic communications, alliance development, economic development and public policy. Casselberry founded Quorum Public Affairs, Inc. in 1994 and since then managed more than 150 professional assignments for companies of all sizes – from Fortune 50 companies like Exxon Mobil, Wal-Mart, AT&T, Pfizer, Dell, and Shell, as well as early-stage small businesses on their growth strategy in Texas. A former policy aide to Governor William P. Clements, Jr. and Secretary Rick Perry (as Agriculture Commissioner), Craig is a published author – his book “Straight Up – The Business of Winning Politics, Communication Strategies for Innovative Companies” provides a roadmap on public policy issues and strategy; has been featured on Fox Business News; serves as a regular contributor to Texas CEO Magazine and Texas Business Radio; named a “Politically-Minded Austinite to Know” by the Austin Business Journal; profiled in the “People to Watch” section of Texas Business magazine, and a featured in a Houston Business Journal cover story as “making new waves in the business world.” Casselberry is an active member of Governor Greg Abbott’s Texas Economic Development Corporation, the lead entity for state business expansion and re-location.



### Dub Sutherland

Dub Sutherland’s practice is focused on business (corporate and securities) and real estate matters. Dub represents private companies, established and startup businesses, financial institutions, non-bank lenders, investment funds (private equity, venture, debt), and real estate developers in daily transaction and all phases of the business lifecycle (formation, acquisitions and dispositions, mergers, conventional debt financing, equity and debt securities offerings, commercial negotiations and transactions, executive compensation plans, and corporate governance). Dub’s real estate finance practice includes sale, acquisition, leasing, financing and development work. Kennedy Sutherland helps clients navigate the landscape of federal and state tax credits (low-income housing, historic rehabilitation, new markets, investment, renewable energy) to maximize the impact of their projects and minimize the average cost of capital. Our Opportunity Zone expertise provides business owners and real estate developers with the ability to quickly and efficiently form their own Opportunity Zone fund with the confidence that they will maximize the program’s tax benefit.



### Haley Wilcox

Haley Wilcox, partner at Ogee LLC, obtained a graduate degree in Historic Preservation at Boston University. She has experience in both the public and private sector in historic preservation and historic real estate development. She has spent the last seven years as a historic tax credit consultant and has worked on projects of all sizes across the U.S. Currently, Ogee, an Austin-based consulting firm, is working on over two dozen historic tax credit projects across Texas, and in Colorado, North Carolina, Arkansas, and Florida. These projects range from small Main Street commercial buildings to \$50M hotel redevelopments. As a lifelong lover of historic buildings, Haley’s goal is to make sure they are intact and utilized for years to come.

## Wednesday, Mar 6, 2019

**7:30-8:45 a.m. Breakfast**  
*Stephen F. Austin Hotel*

**9-9:45 a.m. Legislative Panel**  
*Stephen F. Austin Hotel*

Moderated by Harvey Kronberg of the Quorum Report, with Rep. Ryan Guillen, Rep. Garnet Coleman, Rep. Todd Hunter, Rep. Drew Springer, and Sen. Charles Perry

**10-10:45 a.m. Keynote Address**  
*Stephen F. Austin Hotel*

Caroline Jones, TDSML Commissioner

**11-11:45 a.m. Advocating from the State House to the White House**  
*Stephen F. Austin Hotel*

Lobby Panel: Moderated by Sen. Florence Shapiro with Chuck Rice, Steve Borg, Bob Repass, Glenn Lee

**12-1:30 p.m. Framing the Message**  
*Stephen F. Austin Hotel*

Jenifer Sarver, Sarver Strategies & Dave Shaw, Arrow

**2 p.m. Capitol Office Visits**  
*State Capitol*

Legislative offices

**4 p.m. Debrief**  
*Stephen F. Austin Hotel*

## Speakers



### Ross Ramsey

Ross Ramsey is executive editor and co-founder of The Texas Tribune. Before joining the Tribune, Ross was editor and co-owner of Texas Weekly for 15 years. He did a 28-month stint in government as associate deputy comptroller for policy and director of communications with the Texas Comptroller of Public Accounts. Before that, he reported for the Houston Chronicle from its Austin bureau and for the Dallas Times Herald, first on the business desk in Dallas and later as its Austin bureau chief, and worked as a Dallas-based freelance business writer, writing for regional and national magazines and newspapers. Ross got his start in journalism in broadcasting, covering news for radio stations in Denton and Dallas.



### Evan Smith

Evan Smith is the CEO and co-founder of The Texas Tribune, a pioneering nonprofit, nonpartisan digital news organization whose deep coverage of Texas politics and public policy can be found at its website, [texastribune.org](http://texastribune.org), in newspapers and on TV and radio stations across the state, and in the print and online editions of the Washington Post. Since its launch in 2009, the Tribune has won international acclaim and numerous honors, including a Peabody Award, sixteen national Edward R. Murrow Awards from the Radio Television Digital News Association and three general excellence awards from the Online News Association. Evan is also the host of "Overheard with Evan Smith," a weekly half-hour interview program that airs on PBS stations around the country. Previously he spent nearly 18 years at Texas Monthly, including eight years as the magazine's editor and a year as its president and editor in chief.



### Commissioner Christi Craddick

Christi Craddick is in the forefront of the newest wave of conservatives in leadership roles in Texas. Raised in a strong conservative household, retained as legal counsel by prominent Texas firms, and shaped by more than a decade as a trusted political adviser, Craddick has set a clear standard of integrity, self-reliance and innovation in her position as Chairman at the Railroad Commission. Since her tenure on the Commission began in November 2012, Craddick has pushed to maximize the effectiveness and efficiency of an energy industry that is driving the state's unparalleled economic success. In the process, she has repeatedly proven that sensible regulations, careful listening and plain talk can foster innovation that has solidified Texas leadership in the energy sector.

A native of Midland, the heart of the Permian Basin, Craddick earned both her Bachelor's Degree as a Plan II graduate and her Doctorate of Jurisprudence from The University of Texas at Austin. During her career as an attorney, she specialized in oil and gas, water, tax issues, electric deregulation and environmental policy. She spent nearly 18 years at Texas Monthly, including eight years as the magazine's editor and a year as its president and editor in chief.

## Speakers



### Gary Maler

Gary Maler has served as director of the Real Estate Center at Texas A&M University in College Station since 2005, where he focuses his attention on garnering and managing the resources and talent of the Center, creating a work culture that is favorable to creativity, collaboration and accountability and looking for opportunities to grow the Center's expertise and reputation for excellence. Maler is passionate about strategy and has led the Center in developing a refined list of bold strategic initiatives. During Maler's tenure at Texas A&M, he has initiated and identified decision-making criteria that became the underpinnings of a formalized real estate management system at Texas A&M. Before joining the Center he worked in the private sector in real estate development. While at Friendswood Development Corporation, he performed numerous land suitability and homebuyer preference surveys and the original market studies recommending successful projects including Copperfield, Greenspoint and Kingwood's office as well as entertainment and retail centers. He also oversaw the construction of those and other FDC projects and managed 16 municipal utility districts and their infrastructure.



### 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.



### 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.