



FUEL YOUR GRIND

SALES RALLY
2026
NASHVILLE, TENNESSEE

AGENDA AND PROGRAM GUIDE





This INDUSTRY
REWARDS the
RELENTLESS.

Fuel your
GRIND and
the RESULTS
will follow.

EVENTS

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SALES RALLY AGENDA & VENUE MAP

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MAX MAJOR

Keynote Speaker

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Unlocking New Markets with Non-QM Lending
Mortgage Mayhem: The Escape Room Challenge
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with Greg Goodman, Dave Savage, and Jeremy Radcliffe

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WHY SWBC MORTGAGE?

led by Tim Whittier

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Finding Opportunity in Uncertainty
Broaden Your Base: Referral Partnerships Redefined

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PRESIDENT'S CLUB

THURSDAY
JANUARY

08th

DAY 1

8:00AM-10:30PM

JW MARRIOTT + BELL TOWER

8:00AM-8:45AM | BREAKFAST Symphony Ballroom DEF

9:00AM-9:05AM | KICKOFF VIDEO Symphony Ballroom ABC

9:05AM-9:10AM | OPENING REMARKS—Kerry Dannenberg Symphony Ballroom ABC

9:10AM-10:30AM | KEYNOTE SPEAKER—Max Major Symphony Ballroom ABC

10:30AM-10:35AM | BREAKOUT KICKOFF INSTRUCTIONS—Kerry Fitzgerald Symphony Ballroom ABC

10:35AM-10:50AM >>>>>>>>> TRANSITION PERIOD >>>>>>>>>>

10:50AM-11:50AM | BREAKOUT SESSIONS
WARRIORS | ARLINGTON TITANS | BELLE MEADE I+II GLADIATORS | HARPETH I+II

11:50AM-12:35PM | LUNCH Symphony Ballroom DEF

12:35PM-1:00PM | CEO VISION: EMPOWERING OUR FUTURE—led by Susan Stewart Symphony Ballroom ABC

1:00PM-1:45PM | LEVERAGING MORTGAGE COACH—led by Greg Goodman Symphony Ballroom ABC

1:45PM-2:15PM | WHY SWBC MORTGAGE?—led by Tim Whittier Symphony Ballroom ABC

2:15PM-2:30PM >>>>>>>>> TRANSITION PERIOD >>>>>>>>>>

2:30PM-3:30PM | BREAKOUT SESSIONS
WARRIORS | HARPETH I+II TITANS | ARLINGTON GLADIATORS | BELLE MEADE I+II

3:30PM-3:45PM >>>>>>>>> TRANSITION PERIOD >>>>>>>>>>

3:45PM-4:45PM | BREAKOUT SESSIONS
WARRIORS | BELLE MEADE I+II TITANS | HARPETH I+II GLADIATORS | ARLINGTON

4:45PM-5:00PM >>>>>>>>> TRANSITION PERIOD >>>>>>>>>>

5:00PM-5:15PM | MARKETING AWARDS—Wallace Bates Symphony Ballroom ABC

5:15PM-5:30PM | CLOSING REMARKS—Scott Brown Symphony Ballroom ABC

6:30PM-7:00PM | COCKTAILS The Bell Tower — 400 4th Ave S

7:00PM-10:30PM | DINNER The Bell Tower — 400 4th Ave S

FRIDAY
JANUARY

09th

DAY 2

8:00AM-11:30AM

JW MARRIOTT

8:00AM-8:45AM | BREAKFAST Symphony Ballroom DEF

9:00AM-9:15AM | OPENING REMARKS Symphony Ballroom ABC

9:15AM-10:15AM | FINDING OPPORTUNITY IN UNCERTAINTY—Chris Fredin Symphony Ballroom ABC

10:15AM-11:15AM | BROADEN YOUR BASE: REFFERAL PARTNERSHIP REDEFINED—Kelley Tyrell Symphony Ballroom ABC

11:15AM-11:30AM | CLOSING REMARKS AND Q&A Symphony Ballroom ABC

JW MARRIOTT
Nashville

FLOOR MAP

MAP LEGEND

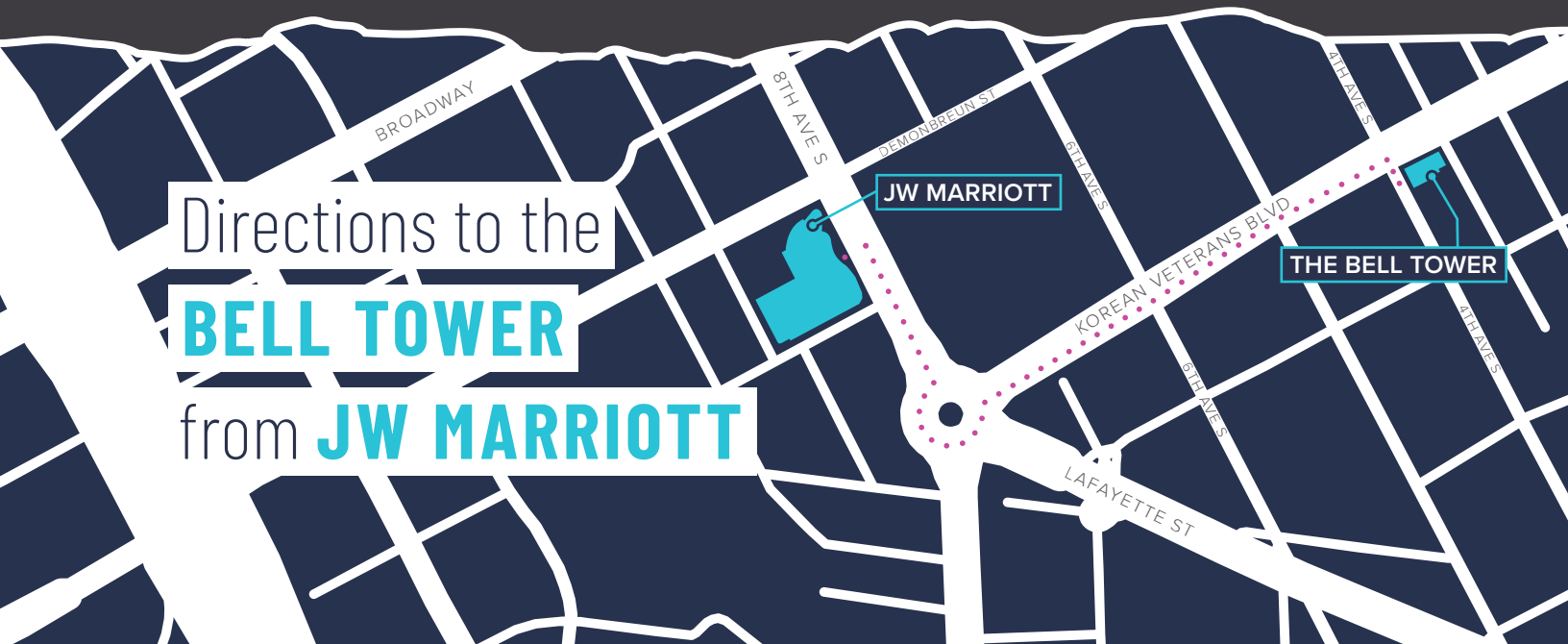
- MORTGAGE MAYHEM ESCAPE ROOM CHALLENGE
- UNLOCKING NEW MARKETS WITH NON-QM LENDING
- TAKING THE GRIND OUT OF GRAND EVENTS
- SALES RALLY GENERAL SESSIONS
- BREAKFAST, LUNCH, DINNER LOCATION
-  RESTROOMS
-  ELEVATORS



Directions to the

BELL TOWER

from **JW MARRIOTT**



YOUR COMPETITIVE EDGE **STARTS** HERE

Want more conversations?
More loyalty? More loans?



Wednesdays with **GREG GOODMAN**

Real talk. **Real** producers. **Real** industry experts.

Lender  Life

THE CONNECTION + VALUE SERIES

Every other Tuesday with **MARKETING**

Turn your marketing tools into a **pipeline** engine.

If you're ready to grow, the coaching you need is ready.
Jump in anytime – check your Outlook calendar.
Watch again on GetMarketingHere.com





DRAFT THE NEXT MVP

Get rewarded for great referrals with a **5 BPS Override** on your recruit's funded volume for 12 months, and enjoy a **\$5,000 bonus** the month after they close their first loan.*

**Exclusions Apply. Speak with your Regional Manager for more information.*

KEYNOTE SPEAKER

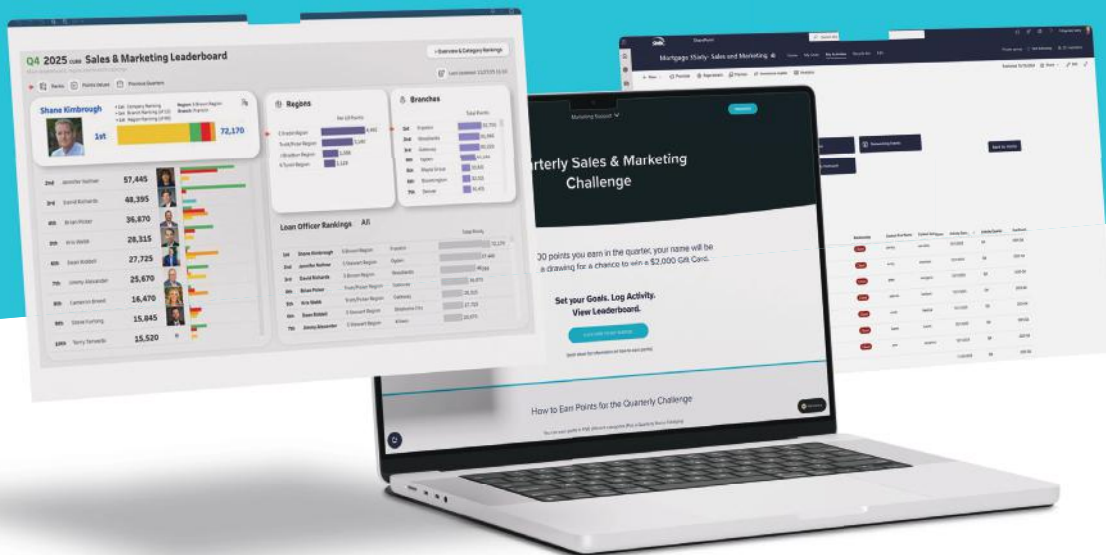
MAX MAJOR

Max Major is a **world-renowned mentalist** known for his jaw-dropping 'real-life Jedi mind tricks.' Based in Las Vegas, he's performed 3,500+ shows for companies like Google, Facebook, and Microsoft, and for global leaders including Chief Justice John Roberts and Sir Richard Branson. A breakout star of America's Got Talent Season 15, he became the first online-audition contestant to reach the finals, earning Simon Cowell's praise as "one of the most astonishing things I've seen in my entire life."

FUEL YOUR **GRIND**



DOMINATE the FIRST 90 DAYS of 2026



The 1st Quarter Sales & Marketing Challenge is under way!

Consistent marketing drives momentum, builds brand recognition, and opens the door to referral conversations long before the busy season hits. Stay accountable, get inspired, and outperform your goals with every challenge.

Top performers earn bragging rights... and rewards.
Visit GetMarketingHere.com/Challenge to start earning points!

BREAKOUT SESSIONS

Unlocking New Markets with Non-QM Lending
Mortgage Mayhem: The Escape Room Challenge
Taking the Grind out of Grand Events

UNLOCKING NEW MARKETS WITH NON-QM **LENDING**

with **BRIAN PICKER & BECKY PADILLA**

This breakout session focuses on the fast-growing non-QM lending space. Learn how to win and save deals using programs many loan officers don't know are available. Hear from an experienced underwriter about what to watch for, and hear real success stories from loan officers using these programs to close more loans and stand out from the competition.



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MORTGAGE MAYHEM: THE ESCAPE ROOM CHALLENGE

with **KELLEY TYRELL, JEFF BRADBURN, MARK JENSEN, BRYAN ROBB, and CHERI GROOMS**

In this fast-paced session, loan officers will team up to solve a complex loan scenario filled with twists, turns, and red flags... just like real life. With changing guidelines and evolving market conditions, success depends on quick thinking, collaboration, and communication. Work together to troubleshoot every issue and “escape” to a clear-to-close before time runs out. Are you ready to take on the challenge?



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TAKING THE GRIND OUT OF GRAND **EVENTS**

with **RICK TROTT**, **TIM WHITTIER** and **WALLACE BATES**

Hosting great events doesn't have to mean high costs or high stress. In this session, you'll learn practical ways for creating impactful events (big or small) on any budget. Discover how to plan smarter, spend wisely, and design experiences that drive leads and build relationships.

We'll share proven roadmaps, creative strategies, and real examples of events that turned simple ideas into major wins. Walk away with tools and inspiration for your next event.



NOTES

This image shows a full page of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page, providing a template for handwriting practice or general note-taking. There are no margins, text, or other markings on the page.

LEVERAGING MORTGAGE COACH

Transform **Rate Shoppers** into **Committed Clients** through transparent, strategic loan comparisons.

Join **Greg Goodman** (*Sales Performance Executive*), **Dave Savage** (*Co-Founder of Mortgage Coach*), and **Jeremy Radcliffe** for a powerful look at how Mortgage Coach drives borrower confidence and higher conversion. Greg and Dave will explain the purpose and impact of Mortgage Coach, including how visual loan comparisons build clarity and trust to convert and retain today's borrowers. Then Jeremy will explain how TCAs increase borrower loyalty and reduce rate-shopping, showing exactly how he uses the platform to turn prospects into committed, long-term clients.

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WHY SWBC MORTGAGE?

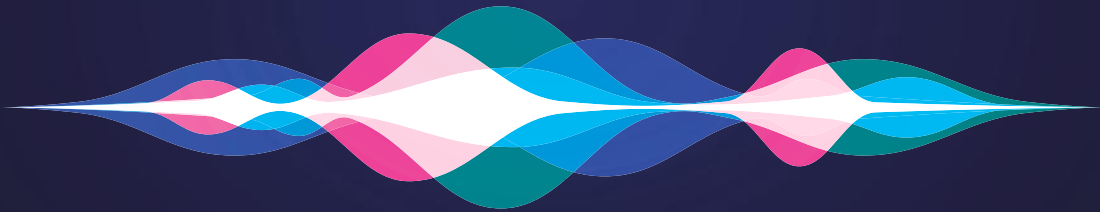
The Grass is **Greener** Here

Tim Whittier will lead a panel discussion with **Jake Ryon**, **Ryan Angier** and **Matt Borgerson**, who know firsthand what makes our company stand out. Together, they'll share real experiences about our culture, support, and stability. The grass isn't always greener elsewhere! This session will highlight the unique advantages of being part of SWBC Mortgage.

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"Hey Cheri, what are the FHA loan requirements for a manufactured home?"



Coming mid January 2026

Ask Cheri is your on-demand AI assistant that helps you find accurate answers about loan products and program guidelines. It saves you time and helps you serve your clients with confidence.



Ask Cheri

PRODUCER PANELS

Finding Opportunity in Uncertainty

Broaden Your Base: Referral Partnership Redefined

FINDING OPPORTUNITY IN UNCERTAINTY

led by **CHRIS FREDIN** with **JAMIE LENES, JENNIFER SIMS, WHITNEY CAVENDER, STEFANO DOHERTY, BRANDON OLSON, KEITH MORROW** and **KA LIA THAO**

Chris Fredin will sit down with a panel of loan officers who turned challenges into growth. They'll share the strategies, habits, and mindset shifts that helped them rise above a changing market and grow their business. Expect practical insights and fresh inspiration you can take into 2026 to elevate your own success.



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BROADEN YOUR BASE: REFFERAL PARTNERSHIP REDEFINED

led by **KELLEY TYRELL** with **SHARON GENEROTTI, JOHN TATUM,
SEAN WILLIAMS, STEVE FURLONG, MELISSA CAMRAS** and **JASON CREE**

Learn how to grow your business by tapping into often overlooked referral opportunities.

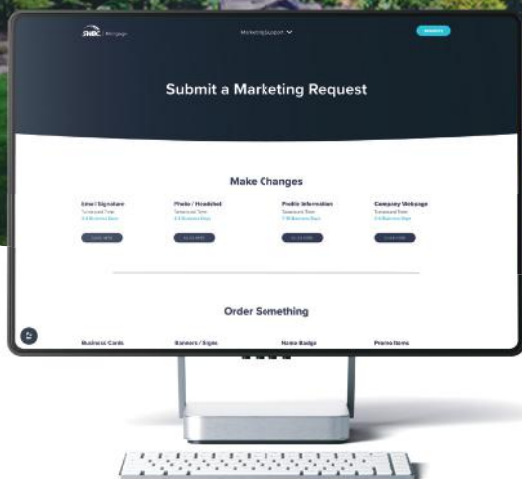
Kelley Tyrell will lead a panel to highlight ways to strengthen connections within your sphere of influence and expand outward through partnerships with real estate agents, financial planners, local organizations, and networking communities.



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Your Support STARTS HERE.



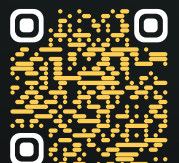
Visit GetMarketingHere.com to access valuable marketing resources and request support for all of your marketing efforts.

IS YOUR MARKETING FUEL LIGHT ON?



FUEL UP WITH MARKETING OFFSET

Use **pre-tax commission dollars** to build an offset account that pays your eligible sales and marketing expenses automatically.



PRESIDENT'S CLUB 2026



THE RESORT AT
PELICAN HILL®
NEWPORT BEACH



PRESIDENT'S CLUB QUALIFICATIONS

Want to make this year's
President's Club? Here's how!

INDIVIDUAL LOAN OFFICERS:

LEVEL	QUALIFYING PRODUCTION
Silver	\$15 million or 100 units
Gold	\$22 million or 150 units
Platinum	\$30 million or 200 units
Diamond	Top 3 Producers – dollars & Top 3 Producers – units*

Note: in the event a producer is **Top 3 in both categories, he/she will be recognized in each category.*

BRANCHES:

The top branches will also be recognized for **PRODUCTIVITY** and **EFFICIENCY:**

OVERALL EFFICIENCY AWARD – Total Dollars

OVERALL EFFICIENCY AWARD – Basis Points

OVERALL PRODUCTION – Volume

OVERALL PRODUCTION – Units

**Eligibility will be based upon production between January 1 and December 31 of the qualifying year. Branch managers are invited to attend the recognition trip if they: 1. Have a loan officer who qualifies. 2. Earn the top spot for branch efficiency or production. To qualify, funded loans must have generated the minimum required fees. Originators hired on or before July 1 of the qualifying year are eligible to participate, with volume and/or units prorated appropriately in the qualification process for those employed between six months and one year.

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FUEL YOUR
GRIND
SALES RALLY 2026

Nashville Tennessee

Program Guide and Agenda