

NoteExpo Day One

Friday, 4th November 2016

MORNING SESSION

7:30 am

Registration Opens

8:30am – 8:40pm in The Ballroom

Opening Remarks – Bob Repass Colonial Funding Group, LLC

8:40 am – 9:00 am in The Ballroom

Welcoming Remarks & Special Presentation

Eddie Speed NoteSchool

9:00 am – 10:00 am in The Ballroom

“Small Balance Real Estate: The Hidden Asset Class”

Matthew Burk Fairway America, LLC | SBREffunds.com

10:00am – 10:30am in The Capital Marketplace

Morning Coffee Break - Sponsored By Halo Companies

10:30am – 11:15am in The Ballroom

“Distressed Debt: Where Do We Go From Here”

Cade Thompson Halo Companies

11:15am – 12:00pm in The Ballroom

Seller Finance Coalition Panel Discussion

Moderator: Matt Keelen The Keelen Group

Panelist: Glenn Lee Texas Funding Corporation

Bob Repass Colonial Funding Group, LLC

Eddie Speed NoteSchool

Charles Tassell National REIA

Jeff Watson The Jeffery S. Watson Law Firm Ltd

12:00pm – 1:15pm in The Capital Marketplace

Lunch Buffet - Sponsored By National Asset Advisors

AFTERNOON SESSION

1:15pm – 1:45pm in The Ballroom

NoteSchool Case Study Of The Year Presentations

Moderators: Bob Repass Colonial Funding Group, LLC

Eddie Speed NoteSchool

1:45pm – 2:30pm in The Ballroom

Servicer Panel Discussion

Moderator: Charles Mangan Colonial Funding Group, LLC

Panelists: Melissa Bolling Allied Servicing Corporation

Chris Cobbs National Asset Services

Kevin Cordell Madison Management Services, LLC

Mike Griffith FCI Lender Services, Inc.

David Pollio SN Servicing Corp.

2:30pm – 3:00pm in The Capital Marketplace

Afternoon Refreshment Break - Sponsored By Allied Servicing

3:00pm – 3:45pm in The Ballroom

IRA Panel Discussion

Moderator: Walter Wofford IRA Deal Maker

Panelists: Michael Cozart Equity Trust Company

Jim Jones IRA Services

Nathan Long Quest IRA

Jeff Watson The Jeffery S. Watson Law Firm Ltd

3:45pm – 4:30pm in The Ballroom

“Note Ownership: Avoid the Pitfalls and Reap the Rewards”

Mike Griffith FCI Lender Services, Inc.

4:30pm – 5:15pm in The Ballroom

Trading & Due Diligence Panel Discussion

Moderators: Bob Repass Colonial Funding Group, LLC

Panelists: Alex Goldovsky ProTitleUSA

Chaz Guinn Granite Strategic Investments

Jorge P. Newbery American Homeowner Preservation, LLC

Dave Van Horn PPR Note Co.

David Pollio SN Servicing Corp.

Jack Krupey PRP Advisors

5:15pm – 5:30pm in The Ballroom

Closing Remarks – Bob Repass Colonial Funding Group, LLC

5:30pm – 7:00pm in the Capital Marketplace

NoteExpo 2016 “Welcome” Networking Reception Event

- Sponsored By Granite Strategic Investments

NoteExpo Day Two

Saturday, 5th November 2016

MORNING SESSION

7:30 am – 8:30 am in The Capital Marketplace

Breakfast - Sponsored By Quest IRA

8:30am – 8:45pm in The Ballroom

Welcoming Remarks – Bob Repass Colonial Funding Group, LLC

8:45am – 9:30am in The Ballroom

“State Of Industry”

Eddie Speed NoteSchool

9:30am – 10:15am in The Ballroom

“The Answer To Most Opportunity Is NO”

Jason Medley The Collective Genius

10:15am – 10:45am in The Capital Marketplace

Morning Coffee Break - Sponsored By IRA Services

10:45am – 11:30am in The Ballroom

“Using the InVestNow Technology Platform to Access the \$14 Trillion Retirement Industry”

Todd Yancey IRA Services

11:30am – 12:00pm in The Ballroom

“Healthcare: The New Realities Facing ALL Investors”

Ryan Parson Colonial Capital Management

12:00pm – 1:15pm in The Capital Marketplace

Lunch Buffet - Sponsored By FCI Lender Services, Inc.

AFTERNOON SESSION

1:15pm – 2:00pm in Meeting Rooms

FIRST BREAKOUT SESSION:

Room 201A: “4th Quarter Investing Using IRAs & Specialty Accounts”

Walter Wofford IRA Deal Maker

Room 201B: “Increase Your Business Tenfold with Online Note Investing Tools”

Tracy Z Rewey NoteInvestor.com

Room 201C: “Due Diligence for Seconds: Picking the Right Loans”

Sherman Arnowitz Keyhole Financial Services

2:15pm – 3:00pm in Meeting Rooms

SECOND BREAKOUT SESSION:

Room 201A: “NotesDirect: Your One Stop Shop for Notes”

Ralph Marshall NotesDirect.com

Room 201B: “Notes Under Your Nose”

Bob Zachmeier NoteCary

Room 201C: “Your Money Milestones: The Powerful Intersection of Wealth Knowledge and Alternatives.”

Ryan Parson Heritage Capital USA | Mile Marker Club

3:00pm – 3:30pm in the Capital Marketplace

Afternoon Refreshment Break - Sponsored By NotesDirect

3:30pm – 4:15pm in Meeting Rooms

THIRD BREAKOUT SESSION:

Room 201A: “Raising Private Money for Your Note Business”

Jillian Sidoti Trowbridge Sidoti, LLP

Room 201B: “Just Be the Bank: Easy, Fun and Lucrative”

David Phelps Freedom Founders Mastermind

Room 201C: “The New Norm: Private Placement Funds”

Ryan Parson Colonial Capital Management

4:15pm – 4:30pm in The Ballroom

Closing Remarks – Bob Repass Colonial Funding Group, LLC & Eddie Speed NoteSchool

4:30pm

NoteExpo Concludes

4:30pm – 6:00pm in The Ballroom

Bonus Training

Eddie Speed NoteSchool