



## MORPAC 2023

# Mid-Year Report

MORPAC is the voluntary, bi-partisan Political Action Committee (PAC) of the Mortgage Bankers Association (MBA). It is the only PAC that directly represents the interests of the real estate finance industry in our nation's political system.

MORPAC helps to build and maintain relationships between our industry and legislators. MORPAC is the best and most transparent way for us to have a positive, collective impact on the political process and support candidates for congressional office who support our interests. It is funded entirely through voluntary contributions from eligible industry professionals.

# TABLE OF CONTENTS

- MORPAC Chair Letter . . . . . 3
- Key Industry Issues . . . . . 4
- Advocacy Wins . . . . . 5
- MORPAC Stats . . . . . 6
- MORPAC Action Week . . . . . 7
- MORPAC Company Campaigns . . . . . 8
- MBA Advocacy Events and Sponsors. . . . . 10
- Candidate Fundraisers and MORPAC Speaker Series . . . . . 12
- MORPAC Contributors . . . . . 13
- Disbursements Map . . . . . 15
- MAA Action Week . . . . . 16
- Advocacy in August . . . . . 17
- National Advocacy Conference (NAC) Recap . . . . . 18



## DID YOU KNOW? YOU CAN CONTRIBUTE TO MORPAC BY TEXTING MORPAC TO 50457

As the only federal PAC that represents the entire real estate finance industry, MORPAC allows us to send a strong, collective and clear message to key policymakers.

Contributions to MORPAC are not tax deductible for federal income tax purposes. Federal law requires us to use our best efforts to collect and report the name, mailing address, occupation and name of employer of individuals whose contributions exceed \$200 in a calendar year. Contributions to MORPAC are used to support candidates to federal office. All contributions to MORPAC are voluntary. You may refuse to contribute without reprisal. The guidelines mentioned are merely suggestions. You are free to contribute more or less than the guidelines suggested and MBA will not favor nor disadvantage you by reason of the amount of your contribution or your decision not to contribute.

# MORPAC CHAIR LETTER

**MORPAC Supporters,**

As a dedicated leader serving on MBA's Board of Directors, as Co-Chair of the IMB Executive Council, and as an avid Mortgage Action Alliance (MAA) participant, I'm honored to be the 2023-2024 MORPAC Chair — helping MBA's bi-partisan political action committee amplify our industry's voice in Washington, D.C. In these challenging times, our mission to engage and support House and Senate candidates and incumbents on key legislative and regulatory policy issues impacting our industry has never been more important.

MORPAC is pleased to share our 2023 Mid-Year Report detailing the progress of our efforts January 1, 2023, through June 30, 2023. As a show of gratitude to our dedicated supporters, this report lists our top MORPAC contributors as well as all disbursements to candidates thus far in the 2024 election cycle. We have highlighted specific advocacy wins your industry's political programs help to advance this year and upcoming August (congressional recess) plans to be led by the [Mortgage Action Alliance \(MAA\)](#), MBA's grassroots network.

As of June 30, MORPAC has raised over **\$550,000** in the 2024 election cycle, disbursing more than a half a million to incumbents' re-election efforts, leadership PACs, and national party campaign committees. During our highly successful MAA Action Week (June 12-16), MAA recruited over 4,100 renewals and 4,000 new MAA members — who are all now eligible MORPAC contributors. **Save the dates for MORPAC's 6th annual Action Week** (September 18-22) during MBA Advocacy Month, a month-long industry-wide campaign that will focus on growing awareness and increasing advocacy participation on a national level.

In addition to a series of fundraising events held for MORPAC at major MBA conferences this year, MORPAC hosted two congressional leadership level events in May: (1) for House Majority Leader Steve Scalise (R-LA), which raised more than \$70,000 at an event in the New Orleans area; and, (2) for House Minority Leader Hakeem Jeffries (D-NY) at the MBA Townhouse with the real estate/housing community raising \$64,000. Both events provided an opportunity for attendees to discuss the debt limit debate and challenges related to housing affordability.

MORPAC hosted its first Speaker Series event of the year with Senator Steve Daines (R-MT), Chairman of the National Republican Senatorial Committee (NRSC), who shared his thoughts about the upcoming 2024 election cycle and the congressional agenda this year. Stay tuned for more Speaker Series events with key policymakers in the coming weeks and months.

Thanks to our members, MBA's Legislative and Political Affairs team executed a successful National Advocacy Conference in April, providing an opportunity for all 425 attendees (from all over the country) to gather in Washington, D.C. to lobby their elected officials.

We look forward to our MBA Advocacy reception and seeing many of you in the fall at MBA's Annual Conference and Expo, October 15-18, in Philadelphia, PA. Please don't hesitate to reach out to me or the MBA and MORPAC staff, and together, we can continue to engage with elected leaders who support the real estate finance industry. None of this would be possible without your active involvement.

**A strong MORPAC means a strong MBA!**

Sincerely,



A handwritten signature in black ink that reads "Owen V. Lee". The signature is fluid and cursive.

**Owen V. Lee, Esq.**  
2023-2024 MORPAC Chairman and Board Member, MBA  
CEO, Success Mortgage Partners, Inc.

# KEY INDUSTRY ISSUES

The issues we fight for represent the entire real estate finance industry. Here's an overview of what we are working on now:

## CREF

- Urge authorizers and appropriators on Capitol Hill to provide the Department of Housing and Urban Development (HUD) greater flexibility regarding FHA multifamily and residential healthcare mortgage insurance programs.
- Support legislative efforts that would address the burdensome split-wage determinations by barring those decisions for FHA assisted projects and by locking in Davis-Bacon wage rates at the time of application.
- Urge the Administration to refrain from supporting any kind of prescriptive federal renters' bill of rights or rent control measures.
- Expand access to finance measures that expand multifamily housing supply, benefiting low-and middle-income renters and buyers and enhancing existing affordable housing programs and initiatives.
- Advocate for reasonable policy approaches to address the management and disclosure of climate change risks affecting the commercial/multifamily finance sector, while appropriately balancing operational burdens against the usefulness of the disclosed information.
- Encourage lawmakers to preserve critical commercial and multi-family industry tax priorities and enact tax laws that support long-term economic growth for real estate financing, such as preserving 1031 Like-Kind exchanges, protecting a meaningful capital gains tax differential, the business interest deduction, and the use of "stepped-up basis," and maintaining the 199A pass-through deduction for small businesses.

## Residential

- Stop the abusive use of trigger leads and unwanted harassment of consumers while maintaining an efficiently functioning mortgage market, i.e., preserving their legitimate use in very limited circumstances, such as a servicer's ability to communicate with existing customers.
- Enacting legislation to establish minimum federal standards to enable nationwide use of Remote Online Notarization (RON).
- Maintain advances made in the prior administration to minimize administrative false claims liability experienced over the last decade by FHA single-family lenders.
- Advance programs that reduce barriers to homeownership (including state and local zoning law and regulations) and support the bipartisan principle of housing affordability as a tool for building financial security and accessing the American dream.
- Reinforce that the CFPB must establish clear and consistent standards — as well as provide the opportunity for notice and comment rather than resorting to the regular use of enforcement actions, blog posts or other tools that do not allow for adequate public input — when enacting rules or making policy changes.
- Encourage lawmakers to preserve industry tax priorities and enact tax laws that support long-term economic growth for real estate, such as protecting the 199A pass-through deduction, supporting deferred tax treatment of income derived from mortgage servicing, and preserving the current tax treatment of "gain on sale" of a home.

# ADVOCACY WINS

MBA advocacy delivers for our members in thoughtful ways with meaningful impact, as noted below.

Since February, MBA has capitalized on targeted opportunities to advance policies beneficial to our industry, including:

- Unanimous House passage of minimum federal RON standards in late February (a bipartisan Senate companion bill was introduced in mid-April);
- Encouraging the introduction of H.R. 4198, the Protecting Consumers from Abusive Mortgage Leads Act, which would eliminate abusive trigger leads while preserving their use in appropriately limited circumstances;
- Leading a broad real estate coalition effort in a letter sent to Senator Bob Menendez (D-NJ) in support of his draft legislation to increase the statutory caps on Federal Housing Administration (FHA) multifamily loans;
- Supporting potential USDA home loan program reforms in the Senate;
- The reintroduction of legislation to permanently extend the deduction for mortgage insurance premiums, expand and improve the Low-Income Housing Tax Credit (LIHTC) program, and establish a parallel single-family credit for substantial rehabilitation/reconstruction within targeted LMI census tracts;
- The reintroduction of bipartisan legislation to strengthen the Mortgage Revenue Bond and Mortgage Credit Certificate programs;
- The reintroduction of legislation to prevent the use of Davis-Bacon Act “split wage” determinations vis-à-vis FHA multifamily projects;
- The reintroduction of bipartisan House legislation to advance needed changes to the flawed implementation of the IRS’s Income Verification Express Service (IVES) tax transcript system;
- The reintroduction of legislation to reaffirm the eligibility of DACA “Dreamers” to apply for FHA-backed mortgages;
- Providing technical assistance to bipartisan, bicameral authors of the Homes for Every Local Protector Educator and Responder (HELPER) Act that would create a first-time homebuyer loan program under the FHA for qualifying first responders;
- Urging appropriate guardrails within any data privacy legislation that may advance; and,
- Working with key appropriators to urge enactment of MBA’s ongoing spending/ programmatic priorities for FY24.

Concurrently, MBA has continued to push for appropriate congressional oversight on issues such as GSE pricing, ESG standards, the operation of FHA’s multifamily program, the impact of planned Community Reinvestment Act (CRA) reforms, examination of the need for a long-term flood insurance reauthorization, and enhanced HMDA and small business reporting requirements.



# MORPAC 2023 STATS

AS OF JUNE 30, 2023

Since January 1, 2023, MORPAC has raised over **\$550,000** in hard dollars so far in the 2023-2024 election cycle.

MORE THAN  
**\$100,000**  
RAISED IN PAYROLL DEDUCTIONS

**668**  
TOTAL DONORS (CONTRIBUTED  
OR PLEDGED) TO MORPAC

**21%**  
OF NEW DONORS

MOST DONORS IN  
**CALIFORNIA**



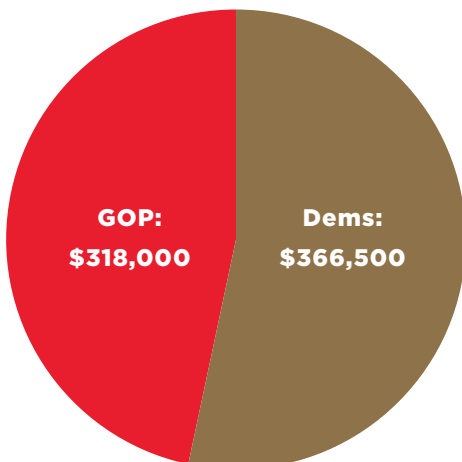
## OTHER INTERESTING STATISTICS ABOUT OUR 2023-2024 CYCLE

**\$51,535**  
CORPORATE DONATIONS

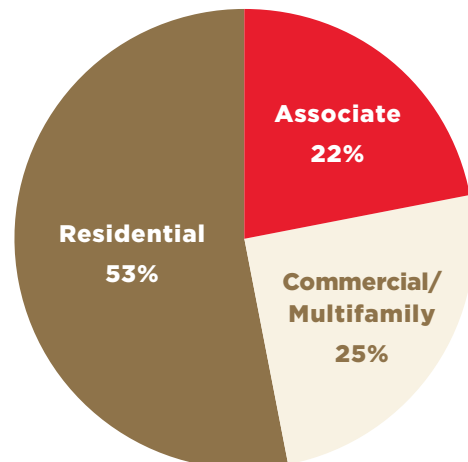
**\$722,331**  
CASH ON HAND

**\$696,570**  
DISBURSED TO CANDIDATES

Dollars disbursed by Party



Dollars by market segment



# MORPAC ACTION WEEK

Company campaigns provide eligible employees with a great opportunity to help themselves — and their industry — in a big way. They increase participation in our MORPAC efforts and expand our political reach.

## HERE ARE SOME HIGHLIGHTS FROM LAST YEAR'S CAMPAIGN

OVER  
**20**

PROFESSIONAL  
ORGANIZATIONS RAN MORPAC  
COMPANY CAMPAIGNS

**\$230,000**

RAISED IN  
INDIVIDUAL DONATIONS

**735**

INDIVIDUAL DONORS  
CONTRIBUTED OR PLEDGED TO  
CONTRIBUTE TO MORPAC

MORPAC Action Week is a national, industry-wide campaign aimed at strengthening MORPAC. Join MORPAC for its sixth annual Action Week, September 18-22, which occurs during [MBA Advocacy Month](#).



## MORPAC Action Week

September 18-22

### September is Advocacy Month!

Huddle up! You have 30 days  
to advocate for our industry.

**PARTICIPATE**



# MORPAC 2023 COMPANY CAMPAIGNS

Thank you to the following MBA member companies for running a MORPAC campaign to date in 2023 and providing recurring payroll deductions:



MBA staff make it easy to execute and we can set up individual calls to discuss goals and tactics to make it a success.

If you, or someone from your team, have questions or would like to run a MORPAC campaign at your company, please contact MORPAC staff at [morpac@mba.org](mailto:morpac@mba.org) or (202) 557-2777. Company campaigns play a crucial role in MORPAC's success, and we can't thank you enough for participating.



# MORPAC 2023 COMPANY CAMPAIGNS CONTINUED

## COMPANY CAPTAIN TESTIMONIAL



**Rick Arvielo**

2017-2018 Former Chair,  
MORPAC, Co-Founder and Co-CEO,  
New American Funding



**Lauren Barnes**

Company Captain, MORPAC  
Executive Assistant & Marketing  
Specialist, New American Funding

“ Supporting MORPAC is quite simply the easiest and most important thing anyone who earns a living from homeowner financing can do. Laws, rules, and new regulations are constantly swirling around DC that have an opportunity to impact the borrowers we serve. It is up to us to make sure our voice is heard, and PAC dollars are a vital component of that ecosystem.

The MBA is our watchdog, and they need the tools to be effective. I challenge my peers to simply choose a company Captain, like I have with Lauren, to spearhead a campaign within your organization. You will be shocked by what you gain in cultural advantage as well. Mortgage staff does care for their industry, but at times they simply do not know how to get involved.”

[\*\*CLICK HERE TO SIGN UP NOW!\*\*](#)

# MBA ADVOCACY EVENTS IN 2023

The MBA Advocacy team has hosted signature receptions and fundraisers during MBA's conference season, including the Independent Mortgage Bankers (IMB) Conference in Coronado, CA; Commercial/Multifamily Finance Convention and Expo in San Diego, CA; Servicing Solutions Conference and Expo in Orlando, FL; Mid-Winter Conference in Bachelor Gulch, CO; National Advocacy Conference (NAC) in Washington, DC; Legal Issues and Regulatory Conference in Austin, TX; Commercial/Multifamily

Finance Servicing & Technology Conference (CMST) in Chicago, IL; Secondary and Capital Markets Conference & Expo in New York, NY; and, Chairman's Conference in Palm Beach, FL.

Reception attendees had the opportunity to hear directly from MBA leadership and staff about the importance of advocacy, our ongoing industry priorities, and how to contribute directly to MORPAC.



## EVENT SPONSORS

A special thanks to our 2023 MBA Advocacy event sponsors, raising more than \$50,000 for MORPAC's Administrative Fund. Your corporate donation to MORPAC's administrative fund allows us to continue to engage our supporters both virtually and in person! If you would like to sponsor a future advocacy event, please email [morpac@mba.org](mailto:morpac@mba.org).



We are looking forward to an exciting schedule of events during MBA's Annual Convention & Expo in October in Philadelphia, including the MBA Advocacy Reception on **Monday, October 16 from 5:00–6:00PM!**

# CANDIDATE FUNDRAISERS AND MORPAC SPEAKER SERIES

MORPAC hosted two fundraisers for House leaders in 2023 raising more than \$130,000 collectively to benefit their re-election campaigns and providing an opportunity for attendees to discuss the debt limit debate and challenges related to housing affordability.



On May 16, MORPAC hosted House Minority Leader Hakeem Jeffries (D-NY) at the MBA Townhouse for a real estate/housing industry event with about 15 related organizations.



On May 19, MORPAC also co-hosted a fundraising event for House Majority Leader Steve Scalise (R-LA) in the greater New Orleans area with Louisianans and MBA members and leadership.

## MORPAC Speaker Series



On June 14, MORPAC hosted its first Speaker Series event of the year with Senator Steve Daines (R-MT), Chair of the National Republican Senatorial Committee (NRSC). Senator Daines updated MORPAC donors, MAA company captains, and MBA leadership

on the offensive role the NRSC will play this cycle in the 23 seats involving Democrat incumbents (Republicans only have to defend 11 seats). The Senator also answered legislative questions about permanency for the Section 199a small business “passthrough” deduction and the prospects for end-of-year action on housing tax credits.

The MORPAC Speaker Series is a donor benefit program, which features a slate of bipartisan political speakers, including Members of Congress and key staff at national party campaign committees, to provide our advocates with timely updates from Capitol Hill and election outlooks from key races across the country. To learn more about these PAC Speaker Series events, [click here](#).

Interested in attending future events or want to learn more? Contact [morpac@mba.org](mailto:morpac@mba.org).

Want to meet the members of the 118th Congress? Contact [maa@mba.org](mailto:maa@mba.org).

# MORPAC CONTRIBUTORS

MORPAC deeply appreciates the support of our 2023 contributors from across the country. We are proud to recognize you on MORPAC's website. Highlighted below are MORPAC's top supporters who contributed \$2,500 and above in 2023 (as of June 30, 2023).

## DIAMOND LEVEL CONTRIBUTORS

**Dana Abernathy, CMB, AMP**  
*Computershare Loan Services*

**Heather Albertelli**

**Jim Albertelli**  
*Albertelli Law*

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**Bill D. Banfield**  
*Rocket Mortgage, LLC*

**Shawn P. Black**  
*Black, Mann & Graham, LLP*

**Al Blank**  
*Black, Mann & Graham, LLP*

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**Byron L. Boston**  
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*Apex Home Loans powered by Luminare Home Loans*

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**Michael Heagerty, CCMS**  
*Gantry*

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**Mark A. Jones**  
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**Tawn Kelley**  
*Taylor Morrison*

**Bill Killmer**  
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**Van Stewart**  
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**Jaclyn Taylor**

**Jeffrey Taylor**  
*Mphasis Digital Risk*

**Richard G. Thornberry**  
*Radian Group*

**Nanci L. Weissgold**  
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**Stephen Whipple**  
*Fairway Independent Mortgage Corporation*

**Thomas L. Wind**  
*U.S. Bank Home Mortgage*

# MORPAC CONTRIBUTORS CONTINUED

## PLATINUM LEVEL CONTRIBUTORS

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**Jean Bradley**  
*Essent Guaranty, Inc.*

**Jeff Burns**  
*Walker & Dunlop, LLC*

**Neal Casey**  
*STS Structured Products LLC*

**Yvette Clermont, CMB, AMB**  
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**Henry Cunningham**  
*Highlands Residential Mortgage*

**Travis Dyson, CMB, CMCP, AMP**  
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Mortgage Corporation*

**Michael Fratantoni**  
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**Michael Gallegos**  
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**William Reynolds**  
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**Daniel Sogorka**  
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**H. Treack Tasker, CMB**  
*Holliday American Mortgage*

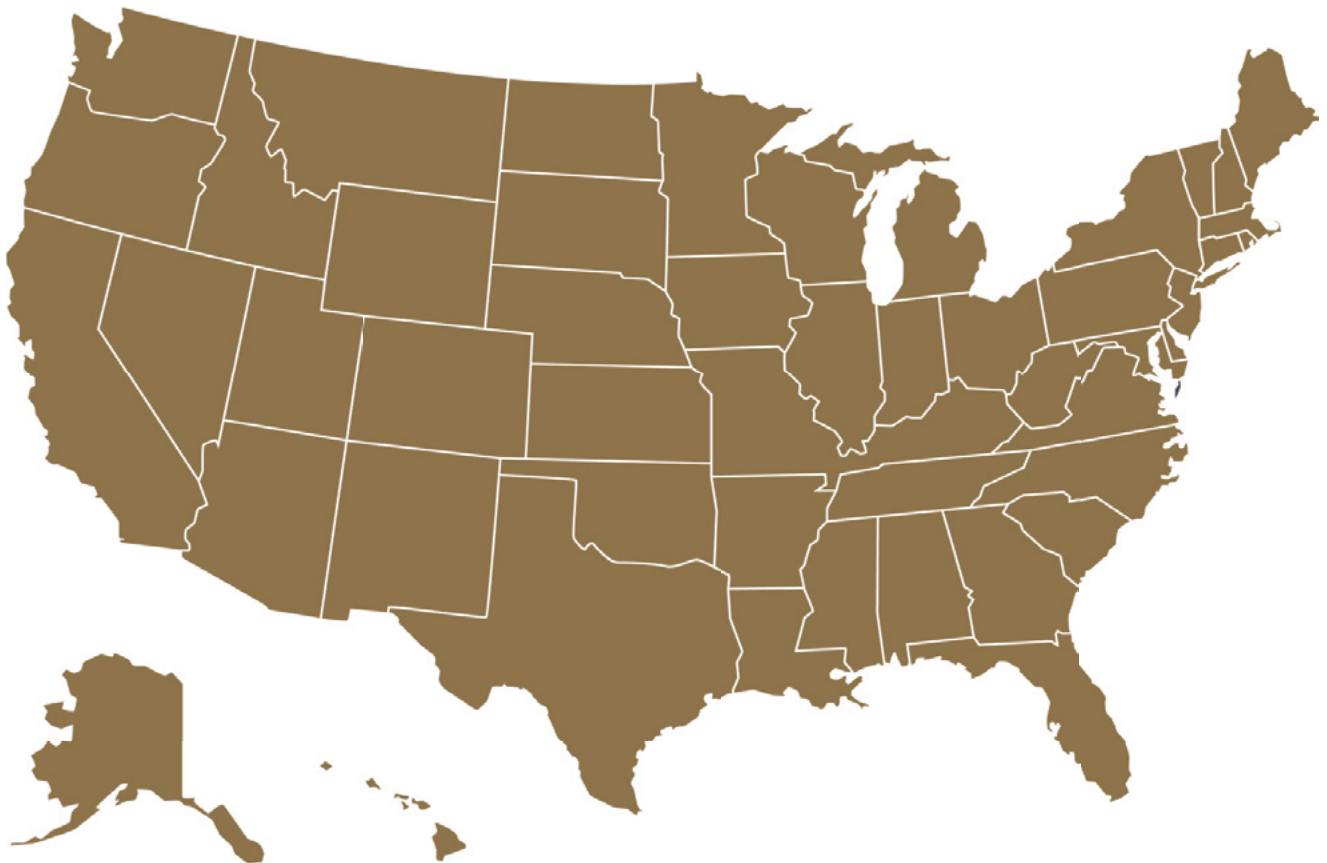
**Jeffrey Weidell**  
*NorthMarq*

**Fowler C. Williams, CMB, AMP**  
*Crescent Mortgage Company*

# DISBURSEMENTS MAP

Thanks to the generous support of our individual advocates, MORPAC has been able to contribute a half a million dollars (to date) in the 2024 election cycle to House of Representatives and Senate incumbents, candidates, and national party campaign committees.

Click on the map to access MORPAC's website and view total disbursements to federal candidates and committees. Note, you will need your MBA username and password to enter.



# MAA ACTION WEEK

The Mortgage Action Alliance (MAA) brings the industry together to maintain a strong, unified voice nationwide in Washington, D.C., and state capitals. This year marked MBA's eighth annual MAA Action Week. Action Week is a national, industry-wide campaign dedicated to growing the number of individual grassroots advocates in the real estate finance industry. A record number of 127 member companies and organizations from all 50 states represented their communities. Action Week generated

over 4,100 renewals and 4,000 new MAA members through this successful collective effort. As of June 30, 2023, active MAA membership stands at over 63,000.

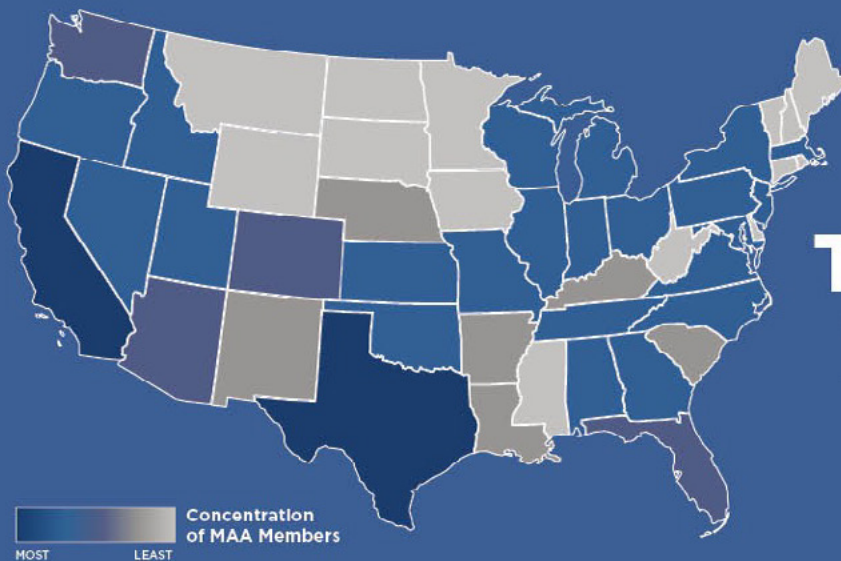
MAA strives to represent as many individuals in the real estate industry as possible — it is never too late to run a MAA company campaign, and MBA staff can help you any time of the year. Thank you to the companies and organizations who participated this year!

## TOP PERFORMING COMPANIES

New American Funding, Fairway Independent Mortgage, DHI Mortgage Company, Paramount Residential Mortgage Group, and AmCap Home Loans

## TOP PERFORMING STATES

Texas, California, Florida, Tennessee, and Arizona



**AMERICA,  
THE INDUSTRY  
NEEDS YOUR  
VOICE!**



MORTGAGE ACTION ALLIANCE



# ADVOCACY IN AUGUST

MBA's Advocacy in August initiative connects MBA members with federal elected officials and senior staff, enabling you to tell your story to build and strengthen existing relationships. During the Congressional August Recess, MBA's Legislative Affairs team will coordinate in-person and virtual meetings in the home state or districts of the elected official.

MBA members can meet directly with members of Congress and their senior staff, advocating on the key issues impacting the real estate finance industry.

These in-person and virtual meetings are critical to our industry's advocacy efforts, as they add a name, a face, and a personal story to complex industry issues.

We need to get in front of policymakers who represent us to educate and share our stories of the industry's impact on our communities.

If you are interested in participating or forming a group to meet with your elected officials, email [maa@mba.org](mailto:maa@mba.org).



# NATIONAL ADVOCACY CONFERENCE (NAC) RECAP 2023

MBA's National Advocacy Conference (NAC) provides a unique experience for MBA members nationwide to participate firsthand in advocacy. This past April, over a third of the 425 attendees experienced their first NAC, 311 of whom attended 265 in-person Hill meetings, meeting with their elected officials and senior staffers. As our members gathered in Washington, D.C., NAC23 allowed them to be a lobbyist for the day, advocating and sharing their stories on critical issues impacting the real estate finance industry on Capitol Hill.

Simultaneously, over 40 of our Commercial/Multifamily members joined in MBA's tailored CREF track at the U.S. Capitol Visitor Center (CVC), which included regulatory

and legislative-facing meetings with senior Committee staff, elected officials, roundtable sessions with regulators, and briefings from MBA's in-house experts.

The National Museum of African American History and Culture provided a spectacular space for the annual conference reception, with 29 individual members of the U.S. House and Senate and more than 100 congressional staffers attendance. NAC23 was a memorable experience for MBA members from all over the country, and next year will be no different.

**MARCH 19-20, 2024** WASHINGTON DC

**MBA's  
NATIONAL  
ADVOCACY  
CONFERENCE**

**NAC**

**SAVE THE DATES!**

**MBA**<sup>®</sup>

MORTGAGE BANKERS ASSOCIATION

**MORP★C**  
MORTGAGE BANKERS ASSOCIATION  
POLITICAL ACTION COMMITTEE