



## 2023-2024 MBA Tampa Bay Executive Positions

Marcus Aguiar – President	<a href="mailto:marc.aguiar@supremelending.com">marc.aguiar@supremelending.com</a>	M (813) 477-3529
Shar Currie – President Elect	<a href="mailto:shar@vetttitle.com">shar@vetttitle.com</a>	M (813) 499-4333
Robert Genders – Past President & CHN	<a href="mailto:rgenders@caticeexchange.com">rgenders@caticeexchange.com</a>	M (813) 420-3750
Elena Katsulos-Sabbouh – Vice President	<a href="mailto:ekatsulosabbouh@far.com">ekatsulosabbouh@far.com</a>	M (813) 394-4693
Kristin Sakora – Treasurer	<a href="mailto:kristin.sakora@usbank.com">kristin.sakora@usbank.com</a>	M (850) 264-4799
Trace Kuhn – Secretary	<a href="mailto:trace.kuhn@wellsfargo.com">trace.kuhn@wellsfargo.com</a>	M (813) 235-3208

## 2023-2024 MBA BOD & Committee Chairs

Beth Larson – Education Chair	<a href="mailto:beth.larson@essent.us">beth.larson@essent.us</a>	M (727) 744-2014
Dawn Henshaw – Event Chair	<a href="mailto:dawn.henshaw@enactmi.com">dawn.henshaw@enactmi.com</a>	M (813) 545-4712
Gina Dionisio – Membership Chair	<a href="mailto:GINA.DIONISIO@suncoastcreditunion.com">GINA.DIONISIO@suncoastcreditunion.com</a>	M (813) 610-2959
Julio Gerena – Fundraising / Sponsorship Chair	<a href="mailto:julio.gerena@gmail.com">julio.gerena@gmail.com</a>	M (813) 701-7963
Darien Goodloe - Golf Chair	<a href="mailto:dgoodloe@bell.bank">dgoodloe@bell.bank</a>	M (727) 460-7858
James Lang – Golf   Web/Tech Chair	<a href="mailto:james.lang@pnc.com">james.lang@pnc.com</a>	M (813) 486-9397
Megan Thanasides	<a href="mailto:mthanasides@republicbank.com">mthanasides@republicbank.com</a>	M (813) 299-6202
Brian Hiatt	<a href="mailto:brian.hiatt@rate.com">brian.hiatt@rate.com</a>	M (813) 924-3500
Christie Buff	<a href="mailto:Christie_buff@mgic.com">Christie_buff@mgic.com</a>	M (727) 420-0981
Stacey Van Schenck	<a href="mailto:staceyv@vandykmortgage.com">staceyv@vandykmortgage.com</a>	M (727) 439-9288
Conrad Johnson	<a href="mailto:conrad.johnson@renasant.com">conrad.johnson@renasant.com</a>	M (813) 990-9714
Steven Schertzer	<a href="mailto:Steven.schertzer@gtefinancial.org">Steven.schertzer@gtefinancial.org</a>	M (813) 414-7818
Raelene Smith	<a href="mailto:Raelene.smith@apmortgage.com">Raelene.smith@apmortgage.com</a>	M (813) 892-6021
Aida Rizo	<a href="mailto:Aida.Rizo@lmcu.org">Aida.Rizo@lmcu.org</a>	M (813) 758-2227



## Executive & Board of Directors

### Duties:

- Serve as a member of the board with full voting rights
- Attend at least 6 of 12 monthly board meetings, in person
- Serve on at least one committee
- Work to increase membership & advocate its benefits
- Market all events to increase attendance
- Network & introduce membership at all attended events
- Mandatory help in some capacity with The Children Home Auction
- Commit to pay for or sell 25 raffle tickets for raffle
- Mandatory help in some capacity with the Annual Golf Classic
- Personal donation or commitment to raise \$ \_\_\_ for MPAC (due May)
- Actively supports & participates in the programs & activities of the association
- Support CMB & Future Leaders awareness & participation
- Solicit membership for future board members & committee participation
- Be an advocate for all things MBA of TB and MBAF with members & non-members alike

### Relationships in the organization:

- Work closely with Chair of the committee you volunteer for (Please be an active volunteer)
- Be the voice of the membership; share all comments/concerns/criticisms with appropriate officer and/or chairperson
- Send your nominations for new Executive Officers/BOD to Secretary when notified

### Calendar:

- July-June Attend all possible chapter Events
- July Individual MPAC commitment made/signed with MPAC Chair
- November The Children Home Auction
- March / April The Annual Golf Classic
- May MPAC Commitments Due
- June Installation Event for MBA of TB/Membership renewal dues/Annual MBAF Conf.



## President

Marcus Aguiar – President

[marc.aguiar@supremelending.com](mailto:marc.aguiar@supremelending.com)

M (813) 477-3529

### Additional Duties:

- Serve as member of the board & executive committee
- Full voting rights and signing authority on bank accounts
- Serve as Chairperson of the MPAC committee
- Work to increase membership and leadership participation
- Actively support & participate in the programs & activities of the association
- Support CMB and Future Leaders awareness & participation

### Relationships in the organization:

- Coordinate with Exec. committee & chairpersons on all possible projects/events
- Work with Vice President on CMB & Future Leaders issues

### Calendar:

- July - June - Attend all possible chapter events / Work with Juice Marketing on preparing speaker flier
- April - Solicit new committee chairs to appoint and directors to nominate
- June - Annual MBAF and Secondary Marketing Convention Present Theme/ Incoming message at Installation / Event Prepare Binders for new Board/Exec Officers/Chairpersons



## President Elect

Shar Currie – President Elect

[shar@vettittle.com](mailto:shar@vettittle.com)

M (813) 524-6340

### Additional Duties:

- Serve as member of the board & executive committee
- Full voting rights and signing authority on the bank accounts
- Works closely with incumbent President to learn duties of the presidency
- In the absence of the President or in the event of the incapacitation of the President, performs duties & exercises the powers of that office
- Serves as Chairperson of the MPAC committee
- As MPAC Chairperson will obtain BOD MPAC personal pledges and invoice them via PayPal
- Works to increase membership and leadership participation
- Actively supports & participates in the programs & activities of the association
- Support CMB and Future Leaders awareness & Participation

### Relationships in the Organization:

- Work closely with the President to prepare for next year
- Coordinate with Exec. Committee & chairpersons on all possible projects/events
- Work with the Vice President on CMB & Future Leaders issues

### Calendar:

- July – June - Attend all possible chapter events
- April - Solicit new committee Chairs to appoint and directors to nominate
- June - Annual MBAF and Secondary Marketing Convention / Present Theme/ Incoming message at installation event / Prepare Binders for new BOD/Exec. Officers/Chairpersons



## Past President

Robert Genders – Past President & CHN

[rgenders@caticexchange.com](mailto:rgenders@caticexchange.com)

M (813) 420-3750

### Additional Duties:

- Serve as member of the board & executive committee
- Full voting rights and signing authority on bank accounts
- Works to increase membership and leadership participation
- Actively support & participate in the programs & activities of the association
- Help support the incoming president as needed to help transition the new BOD to success
- Plan Childrens Home Event and communicate with the Executive Board venue and event details
- Coordinate and communicate with the Childrens Home Management Team information about the event
- Coordinate an art project day at the Childrens Home where the MBA BOD can help provide a day of fun at the center

### Relationships in the organization:

- Coordinate with Exec. committee & chairpersons on all possible projects/events
- Coordinate with MBAF CMB & Future Leaders Chairpersons to share message at local level
- Work with Education Chair for events

### Calendar:

- July- June -Attend all possible chapter events June Annual MBAF Secondary Marketing Convention



## Vice President

Elena Katsulos-Sabbouh – Vice President

[ekatsulosabbouh@far.com](mailto:ekatsulosabbouh@far.com)

M (813) 394-4693

### Additional Duties:

- Serve as member of the board & executive committee
- Full voting rights and signing authority on bank accounts
- Works to increase membership and leadership participation
- Actively support & participate in the programs & activities of the association
- Back-up to Treasurer and all duties/powers of that office in absence or incapacitation of incumbent Treasurer
- Support CMB and Future Leaders awareness & participation
- Prepare to become President

### Relationships in the organization:

- Coordinate with Exec. committee & chairpersons on all possible projects/events
- Coordinate with MBAF CMB & Future Leaders Chairpersons to share message at local level
- Work with Education Chair for events

### Calendar:

- July- June – Attend all possible chapter events June Annual MBAF Secondary Marketing Convention



## Treasurer

Kristin Sakora – Treasurer

[kristin.sakora@usbank.com](mailto:kristin.sakora@usbank.com)

M (850) 264-4799

### Additional Duties:

- Serve as member of the board & executive committee
- Full voting rights and signing authority on bank accounts
- In charge of debit card, square, paypal, check book, deposit slips & signature cards
- Collects generic receipts (to use for luncheons, membership, etc)
- Prepares invoices as needed and collects monthly luncheon fees
- Prepares monthly cash flow sheet and reports balance of checking account at board meetings
- Work with CPA to provide bank statements and end of year cash flow to file tax returns<sup>1</sup>
- Pay monthly fee to website hosting/management company & constant contact
- Pays annual PO BOX fee and maintains PO BOX key to collect mail
- Files annual state filing with the state of Florida (sunbiz.org)
- Coordinate with membership chair to confirm member dues

### Relationship in the Organization:

- Coordinate with membership chair to confirm member dues
- Coordinate with Vice President to fill in when not able to attend an event
- Coordinate with MPAC, Fundraising, Education Chairs for their needs
- Send Quarterly updates to President for Quarterly Reports

### Calendar:

- July - June - Attend all possible chapter events
- October - Send CPA information to file previous year's tax returns
- January - Pay annual PO BOX fee
- April - Update and file Annual filing on Sunbiz.org
- Quarterly:
  - End of Sept, Dec, Mar, June- send update to President - account balances, membership income, MPAC funds, event income/expenses, account interest/fees, miscellaneous expenses, etc
  - June - Transition online account access to new Treasurer, cancel debit card and issue to new Treasurer. Prepare actual budget vs. proposed budget for current year.



## Secretary

Trace Kuhn – Secretary

[trace.kuhn@wellsfargo.com](mailto:trace.kuhn@wellsfargo.com)

M (813) 235-3208

### Additional Duties:

- Serve as member of the board & executive committee
- Keep minutes of all meetings
- Work to increase membership and leadership participation
- Actively support & participate in the programs & activities of the association
- Maintain current Board of Directors contact list
- Check in Members at meetings and send list of attendees to Treasurer

### Relationships in the organization:

- Send Minutes of all meetings to President
- Coordinate w/Treasurer for attendee list for all meetings

### Calendar:

- July – June Attend all possible Chapter events
- Quarterly: (End of Sept, Dec, Mar, June- send all minutes to President)
- April - Coordinate with Membership Chair to send request for nominations for new officers/board to entire membership
- May - Manage voting of new officers / board via e-mail & at Membership Appreciation Event
- June - Order name badges for new board & gold for new President / Send minutes of executive officers to First Horizon for new signature card





## Membership Chairperson

Gina Dionisio – Membership Chair

[gina.dionisio@suncoastcreditunion.com](mailto:gina.dionisio@suncoastcreditunion.com)

M (813) 610-2959

### Additional Duties:

- Grow Membership, individual & corporate
- Collect applications/invoices with all contact info and stay in close contact with Treasurer
- Maintain Membership list, update as needed
- E-mail to thank/welcome new members; include BOD info & calendar of annual events and let them know they will receive certificate at next luncheon
- Membership drive contest when needed
- Print Certificates of Membership for all new members
- Introduce new members and present certificates to new members at luncheons
- TBD - Plan Annual Membership Appreciation Event

### Relationships in the organization

- Send updated Membership list to President & Secretary
- Work with Treasurer to confirm payment of member dues
- Work with Treasurer for funds available from dues for certificates & appreciation event
- Work with Education chair to solicit attendee list for memberships after each event

### Calendar:

- July – June Attend all possible Chapter events / Send membership list to President & Secretary
- July - Send reminders to past member list to renew memberships with list of benefits
- December -January - Push for memberships at 50% discount effective Jan 1 (appreciation event & voting rights)
- June - Send reminders to current members to renew for next year. Solicit successor & discuss with incoming President to help with appointment



## Education Chair

Beth Larson- Education

[beth.larson@essent.us](mailto:beth.larson@essent.us)

M (727) 744-2014

### Additional Duties:

- Secure 12 monthly speakers and confirm venue
- Provide Bio & Picture of speaker to President to send to Juice Marketing
- Future: CMB/Futures Leaders Education Event
- Optional: Book education event(s) as needed
- Update BOD with completed Speaker Sheet

### Relationships in the organization:

- Work with Education Committee, President & Vice President on Meeting Plans, Speakers Needs and Set up
- Coordinate with Treasurer for funds available for speakers

### Calendar:

- July – June luncheon speakers on 2nd Tuesday of each month
- February-March – Help Golf Chair with annual golf classic



## Web / Technology Chair

James Lang

[James.lang@penfed.org](mailto:James.lang@penfed.org)

M (813) 486-9397

### Additional Duties:

- Secure ID & PW's to all social media sites
- Be main contact with WebHost, Everett Teague ([evert@everetteague.com](mailto:evert@everetteague.com) or 850-524-0890)
- Maintain MBA of Tampa Bay's website and social media sites with appropriate photos, postings, BOD information, monthly flier events, and any other updated information
- Promote prior to monthly meetings and events on website and social media outlets
- Promote membership chair with membership reminders on website and social media outlets
- Obtain photos from BOD and or members from events to use in social media postings
- Post from time to time relevant industry news from the National MBA and / or state MBA.

### Relationships in the organization:

- Work with all BOD and Members to keep updated on events of the organization

### Calendar:

- July – June - Attend all possible Chapter events
- July – Promote membership drive / Update website with new incoming Executive & BOD information
- Monthly – Update and promote monthly media on website and all social media outlets
- October – November - Obtain flier from Past President for CHN to promote on website and all social media outlets
- Jan – Promote ½ off membership drive
- February- March – Obtain flier from Golf Chair for annual golf classic to promote on website and all social media outlets



## **Membership Benefits**

**Just to list a few.....**

- **Educational luncheons at reduced prices**
- **Networking opportunities; clients, referrals, managers, employees etc.**
- **Certified Mortgage Bankers (CMB) designation credits earned**
- **MBA Future Leaders Enrollment & credits earned**
- **Annual Golf Tournament in April**
- **Holiday Social (complimentary food & drink) in December**
- **Installation of Officers & Awards Ceremony in June**
- **Voting rights for future Board of Directors and Executive Officers • Volunteer & Participate on any Committee (become a board member)**
- **MPAC (mortgage political action committee) - Make a difference for the future of our industry; get our lobbyist in front of the politicians more often!**
- **MBAF Annual Convention (June) & Southeast Secondary Market Conference at reduced prices (Statewide networking opportunities)**

**...and many more, all you have to do is attend!**

**Thank you for your Membership!**



## MPAC PLEDGE

*“Every man owes a part of his time and money to the business or industry in which he is engaged” – Theodore Roosevelt*

As an elected Director of the Board for the MBA of Tampa Bay, I, \_\_\_\_\_, hereby pledge to make a contribution of at least \$ \_\_\_\_\_ to directly and solely benefit the Mortgage Political Action Committee for the 2021/2022 year.

**OR**

As an elected Director of the Board for the MBA of Tampa Bay, I, \_\_\_\_\_, hereby pledge to raise funds of at least \$ \_\_\_\_\_ to directly and solely benefit the Mortgage Political Action Committee for the 2021/2022 year.

• **Amount pledged is due and payable no later than May 11, 2022.**

Director Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_

MPAC Chairperson Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_



## Fundraising / Sponsorship

Julio Gerena – Fundraising / Sponsorship

[julio.gerena@gmail.com](mailto:julio.gerena@gmail.com)

M (813) 701-7963

## Golf Chairperson

Darien Goodloe - Golf

[dgoodloe@bell.bank](mailto:dgoodloe@bell.bank)

M (727) 460-7858

James Lang – Golf

[James.lang@pnc.com](mailto:James.lang@pnc.com)

M (813) 486-9397

Co-Chair and committee members: