



# **FUTURELENDINGLEADERS** **Orientation**

Class of 2027

## **Your FLL Journey Begins Today**

We're very excited to meet you!

Future Lending Leaders | Orientation

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## Here's today's agenda



You get to know us,  
and we get to know  
you



Discuss the goals and  
requirements of the  
program



Discuss curriculum that  
will be covered



Explain the FLL/mentor  
relationship and  
discuss next steps



Announce future  
program dates – mark  
your calendars!



Answer any questions  
that you may have for  
us



## POLL QUESTION



What other leadership, mentor or  
development programs have you  
participated in?



## Self-Introductions

- Who you are
- How long you've been involved with 7(a)
- Where you work currently and where are located
- What's your title and what you really do
- One personal tidbit to help get to know you better



## NAGGL Staff Introductions



Jane Butler



## NAGGL Staff Introductions



**Margherita Stutz**

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## NAGGL Staff Introductions



**Carolyn Calafiore**

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## NAGGL Staff Introductions



Ginger Allen



## NAGGL Staff Introductions



Susanne Queen



## NAGGL Staff Introductions



Shannon Caldwell



## NAGGL Staff Introductions



Nicole Rodriguez



## Your Turn: Share with us...

- Who you are
- How long you've been involved with 7(a)
- Where you work currently and where are located
- What's your title and what you really do
- One personal tidbit to help get to know you better



**Brian Delaney**  
**Beacon Bank & Trust**



# Matthew Flannery

Provident Bank



# Alonso Gonzalez

Flagship Enterprise



**Peter Hong**  
**SNB Texas**



**Wilson Lin**  
**Columbia Bank**



# Todd Madsen

Bank of Utah



# Andrew Martin

Citizens Community Federal N.A.



# Matthew McCullum

United Community

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# Robert Parkin

Truliant Federal Credit Union

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# Celeb Peterson

Frandsen Bank & Trust

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# Aimee Porter

Community Bank, NA

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# Heidi Prince

Mountain America Credit Union



# Patrick Wahl

First Bank of the Lake



## POLL QUESTION

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What is one thing you hope to experience through this program?



## FLL Program Mission

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An interactive learning experience intended to recognize and develop the next generation of 7(a) industry leaders

## Our Vision for the Program

- **Development** – Dedicating the time, energy and resources to develop the next generation of 7(a) industry professionals
- **Empowerment** – Empowering future leaders with the knowledge and tools to ensure the vitality of the 7(a) Program for future generations
- **Commitment** – Providing pathways for dedicated career professionals to become deeply involved within the industry, give back to the community, and continue the cycle



## We want you to walk away with...



A better understanding of NAGGL, 7(a) and the resources available to members



Insight into the relationship between Congress, SBA and the 7(a) industry



Opportunities to deepen your engagement with the industry and your career as a 7(a) professional



Experience in writing industry articles and presenting in front of an audience of your peers



Practical approaches to policy implantation and leading through change



A network of supportive industry peers to build lifelong connections





# What you put into it is what you'll get out of it

Clint Eastwood

## The program includes...

- ✓ (4) Content Modules
- ✓ (3) Workshops
- ✓ (12) 1:1 Mentor Calls – monthly
- ✓ (9) FLL Virtual Networking Sessions
- ✓ (2) Conferences
- ✓ (2) Leadership Summits
- ✓ Access to the NAGGL team and its resources
- ✓ Special Invites, Bonus Sessions ... and more!



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**= 100+ hours  
dedicated to  
your personal  
growth and  
development**



## 1:1 Mentoring

- You will be paired with an industry professional outside your organization who has volunteered to serve as a mentor
- Together, you will be responsible for setting up at least one 30-minute monthly meeting for the next 12 months
- Discussions can encompass anything on your mind – preparing for or debriefing the latest module, article advice, practicing presentations, career advice, policy/procedure questions, etc.
- FLL/Mentor pairings will be announced prior to the Leadership Summit so that you have the opportunity to connect in-person (if both of you are attending)
- Mentoring will begin after mentors attend their own training scheduled in August



## Monthly Networking

This will be hosted by NAGGL on the same day at the same time each month and will serve as a casual open forum for FLLs and mentors to connect and chat. There will be no set agenda.



*Currently set for the First Thursday  
of every month at 12:00 PM CT*

Any Standing Conflicts?



## Curriculum Overview

*“Firmly Flexible” – This program is designed to adapt with the industry*



## 2026 Schedule (Tentative)

|                     |                                                                                          |
|---------------------|------------------------------------------------------------------------------------------|
| <b>June 26</b>      | <b>Orientation</b>                                                                       |
| July 14-16          | Leadership Summit <i>(Registration Included)</i>                                         |
| August 6            | FLL Monthly Meeting                                                                      |
| <b>August 14</b>    | <b>Module 1: Introduction to the Program and NAGGL</b>                                   |
| September 3         | FLL Monthly Meeting                                                                      |
| <b>September 11</b> | <b>Module 2: Prudent Lending</b>                                                         |
| October 1           | FLL Monthly Meeting                                                                      |
| <b>October 9</b>    | <b>Workshop: Public Speaking</b>                                                         |
| November 3-5        | Annual Conference <i>(Virtual Registration Included; Option to Upgrade to In-Person)</i> |
| December 3          | FLL Monthly Meeting                                                                      |
| <b>December 11</b>  | <b>Workshop: Writing Industry Articles</b>                                               |

*\*Dates are subject to change*



## 2027 Schedule (Tentative)

|                    |                                                                                          |
|--------------------|------------------------------------------------------------------------------------------|
| February 4         | FLL Monthly Meeting                                                                      |
| <b>February 12</b> | <b>Module 3: Intersection of Program and Politics</b>                                    |
| March 4            | FLL Monthly Meeting                                                                      |
| <b>March 12</b>    | <b>Workshop: Expanding Your Leadership</b>                                               |
| April 1            | FLL Monthly Meeting                                                                      |
| May 3-5            | Spring Conference <i>(Virtual Registration Included; Option to Upgrade to In-Person)</i> |
| May 6              | FLL Monthly Meeting                                                                      |
| <b>May 14</b>      | <b>Module 4: Program Innovation</b>                                                      |
| June 3             | FLL Monthly Meeting – Wrap Up/Discuss Graduation Details                                 |
| July 12-14         | Leadership Summit – Charleston, SC <i>(Registration Included)</i>                        |

*\*Dates are subject to change*



## Additional Opportunities

**To be announced as they arise** – program participants will be given advance notice and encouraged, but not required, to attend/participate

Opportunities may include –

- Additional training events and/or group discussions
- Participation as a panelist at a NAGGL event
- Being a guest co-presenter for a NAGGL webinar
- Providing verbal or written comments related to specific 7(a) Program topics or initiatives
- Writing an article for consideration for inclusion in a NAGGL publication



# Questions?

Remember, this is YOUR program!

## Closing Thoughts...



What are you most excited about over the next year?



## We're Here to Help!

- We will be counting on you to tell us what you want to learn about, what we are doing right and where we could do better
- NAGGL's whole team – staff, board members and mentors – stand ready to support you ... if you have and questions or suggestions, please let us know and we will do our best to provide what you need



## Contact Information

Feel free to reach out to any of us at any time, but the primary points of contact for FLLs will be –

- Margherita Stutz, [mstutz@naggl.org](mailto:mstutz@naggl.org), 619.820.5854
- Carolyn Calafiore, [ccalafiore@naggl.org](mailto:ccalafiore@naggl.org)

NAGGL Technical Questions Hub – [info@naggl.org](mailto:info@naggl.org)

- Carolyn Calafiore: Origination/Closing Expert – [ccalafiore@naggl.org](mailto:ccalafiore@naggl.org)
  - Margherita Stutz: Servicing and Liquidation Expert – [mstutz@naggl.org](mailto:mstutz@naggl.org)
  - Ginger Allen: SBA Policy Expert – [gallen@naggl.org](mailto:gallen@naggl.org)
- A complete contact list with FLL, mentors and NAGGL staff will be distributed in August
  - What additional questions or comments do you have now?

