



The NASLB SBA Loan Broker/SBA Lender Summit

Tuesday, April 21, 2026
Blind Center of Nevada

1001 N. Bruce Street
Las Vegas, NV 89101

For any logistics questions about the event, please contact Anna Griggs at anna@colemanreport.com or 586-804-8775.

Sponsors



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LEXICON
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NASLB Vegas Summit Draft Agenda as of April 16, 2026

8:00 am - 8:30 am Networking Continental Breakfast

8:30 am - 8:40 am

Welcome to Las Vegas!

U.S. Small Business Administration

Saul Ramos



Saul Ramos is the District Director of Nevada, which covers 17 counties and almost 300,000 small businesses. With more than 20 years of federal service, he joined the SBA in 2017 and has held multiple leadership roles, including Deputy District Director, Senior Area Manager, and International Development Specialist. Ramos oversees the delivery of SBA programs and coordinates key resource partners, including Small Business Development Centers, SCORE, Women's Business Centers, and Veterans Business Outreach Centers, thereby strengthening Nevada's entrepreneurial ecosystem.

8:40 am - 9:00 am

Summit Opening Keynote Address

A View of SBA Lending from the Community Bank C-Suite

Stacy Watkins - President & CEO, Lexicon Bank



Stacy Watkins is President and Chief Executive Officer of Lexicon Bank, where she leads client services, operations, and commercial lending while driving business growth and community partnerships across Southern Nevada. A seasoned banking executive with nearly three decades of industry experience, she has overseen large regional teams, significant deposit portfolios, and loan production. Under her leadership, Lexicon Bank has expanded its product offerings, grown its team, and achieved early profitability as a de novo institution. Watkins is also deeply engaged in community and financial literacy initiatives, serving on multiple boards and advisory councils and supporting nonprofit organizations focused on economic mobility and education.

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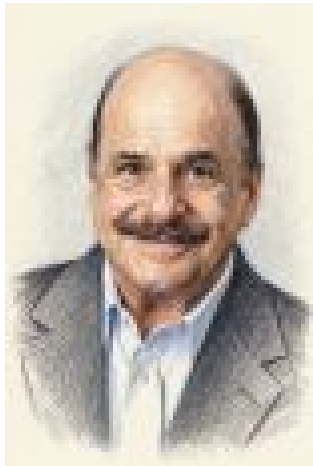
9:00 am to 9:30 am

The SBA 7(a) Business Acquisition Loan

Panel Moderator

David Marcantonio, President & CEO, One Source Business Capital

President, National Association of SBA Loan Brokers



David Marcantonio is the Founder and President of One Source Business Capital, a national commercial finance brokerage specializing in SBA and alternative lending solutions. With more than 30 years of experience in commercial and SBA lending, he has built a reputation as a high-volume loan originator, facilitating nearly \$1 billion in SBA loan production over his career and helping thousands of small business owners access capital. He launched One Source to connect borrowers with the most appropriate funding sources through a broad network of top banks and non-bank lenders, and has consistently been recognized as a leading SBA producer and industry advocate.

Panelists

Zach Balmer, Vice President, Senior BDO, Lexicon Bank



Jake Stone, Team Member, Lendesca



Rocco Perate, President & CEO, Lafayette Square SBLC



9:30 am to 10:00 am

Data Mining for Leads Using SBA's Public Database

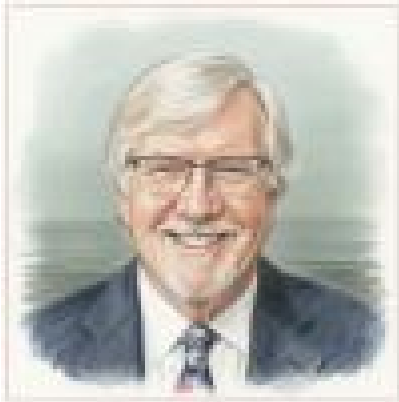
Co-Hosted Conversation

**Beau Eckstein, President & CEO, Emerge Lending Group
Vice President, National Association of SBA Loan Brokers**



Beau Eckstein is the Founder of Emerge Lending Group and a seasoned SBA lending and franchise financing expert with over two decades of experience in real estate and commercial finance. Known for helping entrepreneurs secure capital to start, acquire, and expand businesses, Eckstein combines deep lending expertise with business coaching through his platform, Business Ownership Coach. He has been recognized as a Coleman SBA Loan Broker of the Year. He is widely regarded for his ability to structure complex deals and guide clients through the financing process, particularly in the hospitality and franchise sectors.

Bob Coleman, Publisher & Founder, Coleman Report



10:00 am to 10:30 am

Networking Break

10:30 am to 11 am

How to Do Business with a Top Ten SBA 7(a) Lender

Q&A with Bob Coleman

Harvest SBF Team Headed by Dean Haidl, Executive Vice President



Dean Haidl is Executive Vice President and Regional Sales Manager at Harvest Small Business Finance, bringing more than 30 years of experience in SBA lending across both for-profit and nonprofit financial institutions. He has built a career focused on expanding access to capital for small businesses, with a deep understanding of how financing drives growth and job creation. An entrepreneur himself, Haidl combines real-world business experience with extensive SBA expertise to guide borrowers and referral partners nationwide, helping clients navigate complex lending structures and secure financing efficiently.

Panelists

Cindy Santilena, Senior Vice President & Business Development Officer



Chuck Murphy, Vice President & Business Development Officer



11:00 am - 11:30 am

SBA 504 Loans for Commercial Real Estate

Panel Moderator

Ken Rosenthal, Senior Advisor

Momentum Direct Capital



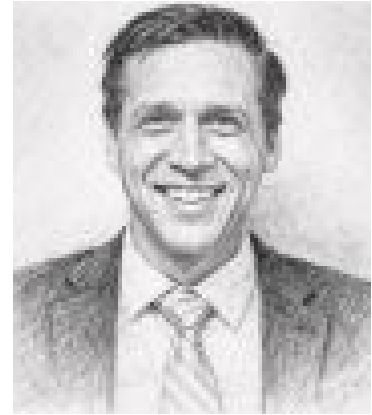
Ken Rosenthal is a Senior Advisor at Momentum Direct Capital, part of the Momentum Capital family, with more than 30 years of experience in SBA lending and small business finance. He has been a national leader in the SBA 504 program since joining CDC Small Business Finance in 1991, and since 2010 has led the growth of wholesale SBA 504 first mortgage lending nationwide. Over his career, Rosenthal has funded more than 1,000 SBA 504 loans totaling over \$2 billion, helping expand access to long-term, fixed-rate financing for small businesses across the U.S. Known for his expertise in structuring complex deals and building institutional partnerships, he has also served as a longtime trainer and former board member for the National Association of Development Companies (NADCO), earning industry recognition for his impact, leadership, and commitment to economic development.

Panelists

Belinda Rosthenhausler, CDC Small Business Finance



Scott Harbertson, Avid Commercial



11:30 am - 12:00 pm

Doing Business With A Passionate SBA Lender

Shoreham Bank

Carissa Sousa, AVP



Carissa Sousa is the Assistant Vice President of Commercial Lending at Shoreham Bank, where she specializes in originating SBA 7(a) and USDA OneRD B&I loans for small businesses nationwide. Since 2019, she has focused on helping entrepreneurs secure financing for business acquisitions, partner buyouts, real estate purchases, working capital, and debt refinancing through the SBA 7(a) program. She earned her MBA from Boston University, building a strong foundation in financial strategy, risk management, and business operations, and is currently attending the Stonier ABA School of Banking at The Wharton School, with expected completion in June 2026.

Kelton Brito, Assistant Vice President of Commercial Operations



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12:00 pm - 1:00 pm

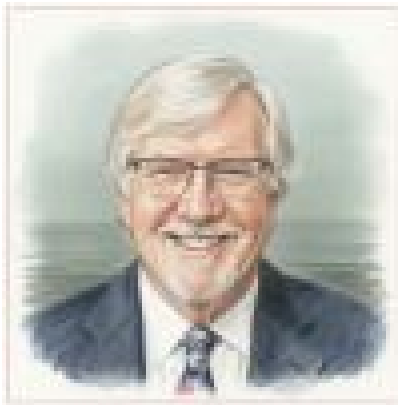
Networking Lunch

Recognition of the 2026 Coleman Award Winners in Attendance

Keynote Address

The Importance of the SBA Loan Broker in the SBA Lending Ecosystem

Bob Coleman, Founder & Publisher, Coleman Report



Bob is the Founder of the Coleman Report, a publisher of data, newsletters, and reports, and is the Executive Producer of conferences, webinars, and training videos to help SBA lending finance become professional small-business lending experts. His passion is bringing capital to Main Street and to small businesses in Rural America.

1:00 pm - 1:30 pm

How We Deliver for SBA Loan Brokers

Community Bank & Trust/Phoenix Lending Services

Stephanie Dunn, EVP & Chief Revenue Officer

Shane Pierson, SBA National Sales Manager



Stephanie Castagnier Dunn is EVP and Chief SBA Revenue Officer at Phoenix Lender Services, a nationwide SBA and USDA lending platform, where she leads revenue growth and strategic expansion initiatives. She brings more than 25 years of experience in financial services and SBA lending, having previously served as President of SBA Lending at Grasshopper Bank, IncredibleBank, and First Bank. Dunn began her career in finance with a focus on helping small businesses access capital and has since become a nationally recognized leader in SBA lending, known for combining relationship-driven banking with innovation. Originally from Montreal, she is also active in industry initiatives, including the North Carolina Innovation Council. She is a strong advocate for small

businesses as a core driver of the U.S. economy.

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Shane Pierson is an SBA lending leader, entrepreneur, and fintech-minded operator with nearly two decades of experience helping business owners buy, build, and grow companies through SBA 7(a) and 504 financing. Based in the Charlotte metro, he serves as SBA National Sales Manager at Community Bank & Trust and Phoenix Lender Services, while also co-founding Lords of Lending, a fast-growing podcast and training platform for SBA professionals. Shane is known for blending relationship banking with process efficiency, automation, and AI to create faster, cleaner loan execution and better borrower experiences. His background includes building and scaling SBA lending teams, driving digital transformation, and originating significant loan volume.

1:30 pm - 2:00 pm

Changes in the SBA Lending Program -- What Lenders and Brokers Need to Know

- MCA Debt Payoff Prohibition
- MCA Debt Definition
- The New 2 Months Bank Statement Rule -- SBA 7(a) Working Capital and Refinancing Debt
- The Grocery Outlier 90% Guaranty Loan Program
- The \$10 Million Manufacturing New Loan Limit
- Decoupling SBA 504 and 7(a)
- SOP 5010 8.1

Panel Moderator



Carissa Sousa, AVP, Shoreham Bank

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Panelists

Fawad Ismail, Los Angeles Regional President, Wallis Bank



Scott Coleman, Vice President, Northwest Bank



Stephanie Dunn



2:00 pm - 2:30 pm

AI 101 for Lenders and Brokers -- How to Start the Race Car

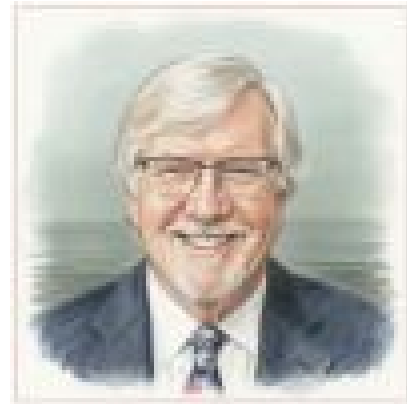
Panel Moderator

Victoria Pelka, Executive Vice President, One Source Business Capital



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Bob Coleman



Beau Eckstein, President & CEO, Emerge Lending Group



2:30 pm to 3:00
Networking Break

3:00 pm - 3:30 pm
Cool Tools for SBA Loan Brokers to Close Deals Faster

Panel Moderator



Bob Coleman

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Panelists

Ryan Conner, President, Personal Guarantee Insurance



Ben Koplan, President & Founder, LifeEase



3:30 pm - 4:00 pm

SBA 7(a) Commercial Real Estate Financing

Panel Moderator



Stephanie Dunn

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Panelists

Zach Chandler, Senior Vice President, Peachtree Group



Zach Balmer, Vice President, Senior BDO, Lexicon Bank



Dean Haidl, Executive Vice President, Harvest SBF



4:00 pm - 4:30 pm

The SBA Loan Broker Referral Fee -- Payment, Documentation, and Compliance

Lance Sexton

Executive Vice President

Community Bank & Trust/Phoenix Lending Services



As a former small business owner, Lance Sexton has a proven track record of working with small business owners and students on entrepreneurship and SBA loan origination, servicing, and liquidation. *He has earned three industry training instruction awards for "Best Online Learning Product"*. Lance is a former SBA Deputy Director at the Little Rock Servicing Center and has over 40 years of experience, including 20 years of direct management of SBA loan portfolios. Lance is an adjunct faculty member of the University of the Ozarks. He is an Executive Vice President, Managing Director of Servicing and Liquidation at Phoenix Lender Services and has been affiliated with Coleman Publishing for over 11 years.

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4:30 pm - 6:00 pm

Networking Reception

Your Guest is Welcome to Join