



Stephens is hosting a conference call for institutional investors with Patrick Roberts from MountainSeed.

#### About MountainSeed & Patrick Roberts



MountainSeed is a leading provider assisting Financial Institutions with their commercial real estate credit and lending needs. The company works with over 10% of U.S. Financial institutions offering CRE property valuation and capital market solutions. They include commercial appraisal management and review services, property tax appeal services for FIs on branches as well CRE owners, and a data business which provides CRE related data to its customers. Through those channels, MountainSeed sees roughly \$60B in CRE transactions on an annual basis. The fourth business line, capital markets, offers FIs the ability to sell or purchase CRE participations, whole loans as well as origination opportunities direct with CRE borrowers. Through this channel, MountainSeed is consistently working over \$200mm a month in CRE loan flow.



Patrick Roberts is the Chief Revenue Officer and former Director of Lender Strategy at MountainSeed. He oversees revenue growth efforts inclusive of sales, marketing and account management functions. Patrick has full responsibility for the company's future revenue stream. He first joined MountainSeed in 2010 as the Director of Sales and Business Development. Patrick left to join Fifth Third Securities as a Director within the Institutional Sales and Trading Group. As a Director within the Bank Group, he opened and built numerous executive-level relationships with other Financial Institution leaders. After Fifth Third Securities, he went to iVita Financial as the VP of Bank Sales. He built and structured the Bank product for iVita. He also brought in a \$20B Bank that invested in an equity position within iVita and is serving as the primary debt source amounting to over \$500mm in debt for iVita's program. He returned to MountainSeed in September of 2018. Patrick lives in Atlanta, Georgia and is an active Board member with the Risk Management Association.

**Conference call date and time subject to change. To join the call or to obtain more information, please contact your Stephens sales representative.**

**Thursday, October 1st at 3:00 p.m. ET/2:00 p.m. CT**

#### Topics of Discussion

- CRE valuation/appraisal trends post-COVID.
- CRE appraisal volume trends post-COVID.
- Interest levels from bidders for distressed bank debt.
- Deferred loan portfolios and the potential for other problem assets.
- Readthroughs from public REIT valuations.

#### Conference Call Hosts

##### Brody Preston

Research Analyst  
Banks: Mid-Atlantic  
(207) 808- 5900

[brody.preston@stephens.com](mailto:brody.preston@stephens.com)

##### Matt Breese

Managing Director  
Banks: Northeast  
(207) 233- 4399

[matt.breese@stephens.com](mailto:matt.breese@stephens.com)