



MISMO WINTER SUMMIT AGENDA

January 7-11, 2019
Clearwater, FL

Thank you to our sponsors for making this event possible:



Monday, January 7th

Education sessions will be offered throughout Monday in the Aqualea Ballroom unless otherwise noted

Themes for Monday's Education Content:

- New and emerging technologies and what they may mean for the industry
- Reducing costs, increasing margins, and delighting your customers
- The latest updates on reporting requirements from the GSEs and other housing agencies

Monday Meetings / Events

Fresh Perspectives on Solutions in the Digital Age

9am – 9:45am

There are still many questions and uncertainties surrounding the digital transformation of the mortgage industry. Attend this session to hear experts from across the industry provide their perspectives on commonly asked questions and how to solve the problems that we all face in the current environment.

A Peek into the Private Label RMBS Market and the Potential for Standardization

9:45am – 10:30am

Attend this session to get a glimpse into the private label securities market from multiple perspectives as presented by representatives from ratings agency; third party reviewer; originator and investor perspectives. The panel will talk to the current state of private label RMBS, including challenges and opportunities and cover the new MISMO PL RMBS Standardized Dataset initiative.

Break

10:30am – 10:45am

Magic 8 Ball – What will the Industry Look Like in 3-5 Years?

10:45am – 11:30am

MISMO is embarking on a project to collaborate with industry participants from across the mortgage ecosystem to establish a view on what the mortgage market may look like in 3 to 5 years and what MISMO's role could, or should be, in that vision. The results will help guide MISMO strategic planning activities over the next couple of years. Attend this session to hear the results of an initial workshop on the topic.

The Case for Uniform Mortgage Servicing Data Standards

11:30am - Noon

Adoption of servicing data standards is no longer just a good idea. Attend this session to hear Karan Kaul of the Mortgage Servicing Collaborative at the Urban Institute lay out the business case for why the time has come for the real estate finance industry to embrace and adopt industry servicing data standards now.

Orientation for Newcomers

Noon - 1:30 pm

Madeira

Never attended a MISMO Summit before? New to MISMO? Be sure to mark your calendar for the lunchtime orientation session that will be offered on Monday at lunch time. Please bring your lunch.

Emerging Technologies – Blockchain Demos

1:30pm – 3pm

Tired of simply talking about blockchain? Join this session to see and experience live demonstrations of actual industry blockchain applications.

Break

3pm – 3:15pm

MISMO Initiatives – A Deep Dive Into MISMO’s Business Reference Model and Business Glossary

3:15pm – 4pm

MISMO is actively working to build on the foundation of today’s standards and pave the way for new types of standards, tools, and products to support tomorrow’s mortgage industry. Attend this session to learn the latest development of MISMO’s new Business Reference Model and the Business Glossary and to learn how you can get involved.

Mortgages and the Microservices Economy – Driving Down Costs While Enhancing the Customer Experience

4pm – 4:45pm

With everyone going to light weight services and APIs it is expected that many aspects of the loan manufacturing and servicing life cycles will change as organizations work to delight their customers and make processes more efficient and cost effective. How will they do this? Join this session to hear the latest thinking from industry experts.

[Residential Standards Governance Committee Meeting](#)

5:00pm – 6:30pm

Madreira

Tuesday, January 8th

Special Training Opportunity

LIVE COURSE: [Course 2 – MISMO Implementation Case Study](#)

9:00am – 4:30pm

Longboat Key B

This course is designed for business and technology professionals who are currently (or who may soon be) involved in the consideration, planning, and/or development of a MISMO-based project. The course provides an interactive case study of how to map data to the MISMO Reference Model. This includes creating the required conditionality and cardinality and leveraging them along with the data mapping to the MISMO Reference Model to create specifications for your developer. [For a complete course overview, click HERE.](#)

Please note: A separate registration is required for this course. See details at registration link which will be posted shortly.

Agency and GSE Update Brown Bag

12:15pm – 1:25pm

Aqualea A&B

The world does not stand still, and neither do the regulators or housing agencies. This is must see session! The GSEs and other agencies have many initiatives underway that could affect your organization including new information about the Uniform Loan Delivery Dataset (ULDD) Phase 3; Uniform Residential Loan Application (URLA); the Uniform Loan Application Dataset (ULAD); the Uniform Appraisal Dataset (UAD) and the Uniform Closing Dataset (UCD).

Tuesday Community of Practice (CoP) and Development Workgroup (DWG) Meetings

- [eMortgage CoP](#)
 - General and Industry updates

9:00am-3:00pm

Aqualea A&B

- Final review of the updated eClosing I-guide
- Working session on updating the eVault I-Guide
- Working session on the Schema version for SMART Doc 1.02 DTD for Improved validation and testing

- [Property and Valuation Services CoP](#) **9:00am - Noon**
Madeira

- [Logical Data Model Redesign DWG](#) **9:00am – Noon**
Aqualea C

- [Decision Modeling CoP](#) **10:30am-noon**
Siesta Key
 - Overview of the Decision Modeling Community of Practice and current activities
 - Elect 2019 Decision Modeling CoP leadership
 - Demonstrate live DMN decision services
 - Discuss decision services’ place in the MISMO B2C/API/microservices world
 - Identify decisions in the BREF Life of Loan business process model

- [Business Reference Model DWG](#) **1:30pm – 4:30pm**
Siesta Key
 - Overview of the Business Reference Model DWG (who we are, what we do)
 - Review MISMO Life of Loan
 - Collaborate with other workgroups (DWGs and CoPs) on additional MISMO Life of Loan content
 - Create Business Reference Model Guidelines (MEG)
 - Plan for work up to the Spring Summit

- [Verifiable SMARTDOC 3.0 Profile DWG](#) **3:00pm – 4:30pm**
Aqualea A&B

- [Mortgage Insurance CoP](#) **1:30pm - 4:30pm**
Madeira
 - Election of CoP Leaders
 - Work on Uniform Loan Application Dataset (ULAD) and MISMO 2.x and 3.x requirements for Mortgage Insurance
 - Review proposed new MI Activation transaction

Tuesday Additional Meetings / Events

[Membership and Revenue](#) Committee Meeting

9:00am - Noon
Sand Key

SCOUT Task Force Meeting

1:30pm – 3:00pm
Aqualea C

The Scout Program is MISMO's effort to listen, hear and learn what is impacting your business today and how the Standards can be leveraged to address, Legal, Regulatory, Risk, interoperability or other issues which may be affecting your business. If it is affecting you, it is probably affecting many others. By leveraging the Standards Process, we can identify industry trends, find common issues and use the collaborative process to help reduce the friction which is so costly to all parties involved. Come and visit us. We would love to hear from you.

[Strategic Planning Committee](#) Mtg

1:30pm – 4:30 pm

Sand Key

Daily Wrap Up

4:30pm – 5:00pm

Aqualea A&B

[Education Committee \(by invitation only\)](#)

4:00pm – 5:00pm

Madeira

Cocktail Reception and [Annual Award](#) Ceremony

5:30pm-7:30pm

Sky Terrace 16th Floor

Wednesday, January 9th

Wednesday Community of Practice (CoP) and Development Workgroup (DWG) Meetings

- [Blockchain CoP](#)

9:00am – 4:30pm
Aqualea A, B, & C

 - Election of CoP Leaders
 - Morning Session will focus on Blockchain Education
 - Afternoon Working Session on the following areas:
 - Operational Framework
 - Use Cases
 - White Paper Review

- [Title Insurance CoP](#)

10:30am-Noon
Madeira

- [Remote Online Notarization DWG](#)

10:30am – Noon
Siesta Key

 - Review the status of the standards publication through MISMO
 - Present plans on RON educational webinars
 - Present communication plans and materials to promote the standards across industries
 - Ask for and align volunteers on other communication needs

- [Servicing CoP](#)

9:00am - Noon
Sand Key

- Election of CoP Leaders
 - Overview of Servicing CoP Work
 - Review and discuss servicing components within the MISMO Business Reference Model and Business Glossary
 - Review approach for Private Label RMBS DWG and determine participation from Servicing CoP
- [Secondary CoP](#) **1:30pm—4:30pm**
Siesta Key
 - Election of CoP Leaders
 - Overview of the Secondary COP work
 - Review and Discuss Updates to the MISMO HMDA Toolkit Deliverables
 - Outstanding work: 2018 vs 2019 HMDA
 - BCFP (CFPB) HMDA Reporting Announcements
 - Review and Discussion of Secondary Components in MISMO Business Reference Model and Business Glossary
- [Closing Instructions DWG](#) **1:30pm-4:30pm**
Madeira
- [3rd Party Business Partners Risk Management](#) **9:00am - Noon**
Longboat Key B
- [Mortgage Insurance](#) **9:00am—10:30am**
Madeira
 - Continuation of Agenda from Tuesday

Wednesday Additional Meetings / Events

[Architecture Workgroup](#) Brown Bag Lunch Session

12:30-1:30pm
Aqualea A, B, & C

[Board of Directors](#) Mtg (by Invitation Only)

1:30pm – 4:30pm
Sand Key

Daily Wrap Up

4:30pm-5:00pm
Aqualea A, B, & C

Joint Committee Meeting (by invitation only)

5:00pm—6:00pm
Aqualea A, B, & C

Thursday, January 10th

Thursday Community of Practice (CoP) and Development Workgroup (DWG) Meetings

- [Private Label RMBS DWG](#) **9:00am-4:30pm**
Aqualea C
- [Origination CoP](#) **9:00am-Noon**
Aqualea A&B
- [Business to Consumer DWG](#) **1:30pm – 3:00pm**
Aqualea A&B
- [Fee Naming DWG](#) **1:30pm – 4:30pm**
Madeira
- [3rd Party Oversight Questionnaire DWG](#) **9:00am - noon**
Siesta Key
- [Data Governance and Management CoP](#) **1:30am – 4:30pm**
Siesta Key
 - Review Status of Proposed CoP Artifacts for 2019-2020
 - Share Executive Call to Action Presentation
 - Create/review the Data Governance & Management Program Framework Template
- [Credit Reporting CoP](#) **1:30pm – 4:30pm**
Longboat Key B
- [Business Glossary DWG](#) **3:00-4:30pm**
Aqualea A&B
 - Status of v1 content release and Proof of Concept demo in AnalytixDS tool
 - Testing results, user profiles defined, MEG progress
 - Defining and elect roles to drive specific BGloss initiatives forward (ex. Editor, Data Steward, Tool Admin)
- [Emerging Tech CoP](#) **9:00am - noon**
Madeira
 - Election of CoP Leaders
 - Present educational artifacts covering basic concepts, definitions, and applications of emerging technologies. If applicable, continue building out the educational artifacts as a group.
 - Continue the discussion on how emerging technologies apply to the mortgage industry and to the MISMO standards.
 - Continue dialogue on recommending a vision and strategy for Open APIs and the future of fintech from a standards perspective. This may involve formal collaboration with other communities of practice or workgroups.
 - Continue the discussion on what our next work products should look like. If applicable, analyze Fannie Mae’s Sentiment Survey results for guidance prioritizing the next work products.

Thursday Additional Meetings/Events

Business Executive Team (BET) Meeting

10:30am – noon
Sand Key

Daily Wrap Up

4:30pm-5:00pm
Aqualea A&B

Council of Chairs Luncheon Meeting (by Invitation Only)

Noon -1:30pm
Belleair Room

Friday, January 11th

There are no sessions currently scheduled.