MISMO FALL SUMMIT
AGENDA

August 31-September 3, 2020
Virtual Online Event

Sponsored by:

MERS

SAGENT LENDING TECHNOLOGIES

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Monday, August 31st:

Education Sessions

Looking Past the Lions, Tigers and Bears:
How the Mortgage Industry Can Navigate the Road Ahead
11:00am – 11:45am EST

COVID-19 pandemic. Historically low interest rates. Record high numbers of borrowers in forbearance. What do these developments mean for the industry? Join this session to hear what experts from across the industry believe to be important and their strategies for managing through the incredible amount of information and change that we all face today.

*Moderator:* Rick Hill, Executive Vice President, MISMO; Vice President of Industry Technology, MBA

*Featured Speakers:*
  - David A. Coleman, Managing Director, Advisory, KPMG
  - Jeff London, Executive Director, Loan Guaranty Service, Department of Veterans Affairs
  - Brian Woodring, Chief Information Officer, Quicken Loans

Show Me the Money:
11:45am – 12:30pm EST

How have digital closings evolved since the pandemic began? What’s changed and still changing? Join our panel of digital mortgage experts as they strive to answer these questions and more.

*Moderator:* Camelia Martin, Managing Director, Digital Mortgage Advisory, Falcon Capital Advisors

*Featured Speakers:*
  - Christopher McEntee, President, ICE Mortgage Services and MERSCORP Holdings
  - Amy Moser, Vice President of Mortgage Services, Mountain America Credit Union
  - Kim Newby, Senior Vice President – Credit Policy, Investor Relations & Product Development; Waterstone Mortgage

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

- **Newcomer Orientation**
  Logistics TBA
  12:45pm - 1:15pm

- **Credit Reporting CoP**
  Conference Line (855) 260-5550 Code: 8431793
  1:30pm - 3:25pm

- **Digital Loan Modifications DWG**
  Conference Line (855) 260-5550 Code: 3258975
  1:30pm - 3:25pm
Adobe Connect URL http://mismo.adobeconnect.com/summit1/

- **Fee Collaboration DWG**
  Conference Line (855) 260-5550 Code: 2701245
  Adobe Connect URL http://mismo.adobeconnect.com/summit4/
  1:30pm - 3:25pm

- **Residential Appraisal DWG**
  Conference Line (855) 260-5550 Code: 1196446
  Adobe Connect URL http://mismo.adobeconnect.com/summit2/
  1:30pm - 3:25pm

- **Data Governance CoP**
  Conference Line (855) 260-5550 Code: 4293230
  Adobe Connect URL http://mismo.adobeconnect.com/summit2/
  3:30pm - 5:25pm

- **JSON DWG**
  Conference Line (855) 260-5550 Code: 3856486
  Adobe Connect URL http://mismo.adobeconnect.com/summit1/
  3:30pm - 5:25pm

- **Title & Closing CoP**
  Conference Line (855) 260-5550 Code: 9561447
  Adobe Connect URL http://mismo.adobeconnect.com/summit4/
  3:30pm - 4:25pm

- **Servicing Transfers DWG**
  Conference Line (855) 260-5550 Code: 7302035
  Adobe Connect URL http://mismo.adobeconnect.com/summit3/
  3:30pm - 5:25pm

- **Wrap Up**
  Conference Line: 855-260-5550 Code: 5572940
  Adobe Connect URL http://mismo.adobeconnect.com/mismo_meeting/
  5:30pm – 5:55pm

- **Residential Governance Committee (Invitation Only)**
  6:00pm – 7:00pm
**Tuesday, September 1st**

**Education Sessions**

**Beyond Bits and Bytes:**
How Data Governance and MISMO Can be Springboards to Digital Success
11:00am – 11:25am EST

This session explores challenges lenders often experience when moving towards a digital mortgage process and advice on how to avoid potential pitfalls and accelerate the process through data governance and industry standards. Regardless of where you and your organization are on your digital journey this session will have something for you.

**Featured Speakers:**
- Eric Lapin, First Vice President, Old Republic Title
- Matt Seu, Partner, Mortgage and Fixed Income Practice, Actualize Consulting

**If You Build It They Will Come:**
Digital Resources and Initiatives
11:25am – 11:45am EST

Creating a better digital mortgage experience for all parties involved in a real estate transaction is critical to growing your business and maintaining business relationships. Join this session to learn about initiatives underway to support the evolution including digital loan modifications, verifiable SMART Doc® and recent updates to the eClosing and SMART Doc Implementation Guidance, and more!

**Featured Speakers:**
- Charlie Epperson, Chief Technical Officer, SigniaDocs/Evolve Mortgage Services
- Rachael Sokolowski, President, Magnolia Technologies

**Industry Innovation - eDoc / eVault Interoperability – Industry Feedback Needed**
11:45am – 12:05pm EST

eDoc / eVault interoperability is critical to scaling up eMortgage volumes. The MISMO eDoc/eVault Interoperability DWG is making great progress developing guidelines/best practices/recommendations on creating eDocuments and sharing them across vaults. Join this session to learn the latest and bring your voice into the process.

**Featured Speakers:**
- Josh Koppang, Team Leader, NexSys Technologies
- Katie Paolangeli, Senior Vice President, Production Management eMortgage Technology, SigniaDocs/Evolve Mortgage Services
Here Comes the Sun: 
Certifications and Assessments 
12:05pm – 12:30pm EST

With the myriad of digital platforms and solutions, how do you differentiate one from the other? New MISMO certifications and assessments, available and in process, enable participants to shine a light on multiple products and help differentiate the cream of the crop. Attend this session to learn more.

**Featured Speaker:**
- Jonathan Kearns, Vice President Product Development, MISMO

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

- **Business Glossary DWG** 1:30pm - 3:25pm
  Conference Line (855) 260-5550 Code: 5917904

- **Strategic Planning Committee (Invitation Only)** 1:30pm – 3:25pm

- **Emerging Technologies CoP** 3:30pm - 5:25pm
  Conference Line (855) 260-5550 Code: 7499659

- **Residential Appraisal DWG** 3:30pm - 5:25pm
  Conference Line (855) 260-5550 Code: 1196446

- **Remote Online Notarization (RON) DWG** 3:30pm - 5:25pm
  Conference Line (855) 260-5550 Code: 7828375

- **Servicing Portfolio Risk and Retention DWG** 3:30pm - 5:25pm
  Conference Line (855) 260-5550 Code: 1595221

- **Wrap Up** 5:30pm – 5:55pm
  Conference Line: 855-260-5550 Code: 5572940

- **Joint Committee Meeting (Invitation Only)** 6:00pm – 7:00pm
Wednesday, September 2nd

Education Sessions

Agency Spotlight: Ginnie Mae
11:00am – 11:30am EST

Hear it here first. Join this session to get the latest on Ginnie Mae MISMO adoption initiatives and what they mean for you and your organization. This is a must-see session!

Featured Speaker:
- Tamara Togans, Vice President Enterprise Data Management, Ginnie Mae

Agency Spotlight: Going Digital
11:30am – 12:00pm EST

The times they are a-changing as Ginnie Mae and FHLB Dallas and Des Moines announce acceptance of digital loan files and eNotes. Attend this session to hear the latest directly from Ginnie Mae and FHLB representatives and other industry experts.

Moderator: Rachael Sokolowski, President, Magnolia Technologies
Featured Speakers:
- Angel Hernandez, Director MBS Policy and Program Development, Ginnie Mae
- Vonda Renfrow, Vice President Director Member Services, Federal Home Loan Bank of Des Moines

Agency Spotlight: GSE Updates
12:00pm – 12:30pm EST

The world does not stand still, and neither do the regulators or housing agencies. Attend this session to hear the latest from the GSEs on Uniform Mortgage Data Program (UMDP) activities such as the Uniform Residential Loan Application (URLA) roll-out and Residential Appraisal Dataset development.

Featured Speakers
- James Babalitis, Senior Manager, Fannie Mae
- Colleen Flaxington, Project Manager Senior Business Lead, Freddie Mac
- Mark Friend, Product Analyst, Fannie Mae
- Kasie Lynn, Project Manager, Freddie Mac
- Denise Rivoal, Senior Manager, Fannie Mae
- Kathy Scanlon, Product Development Director, Freddie Mac

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

- Business Reference Model CoP
  Conference Line (855) 260-5550 Code: 7207933
  Adobe Connect URL http://mismo.adobeconnect.com/summit3/

- 1:30pm - 3:25pm
• Closing Instructions DWG
  Conference Line (855) 260-5550 Code: 5348211
  Adobe Connect URL http://mismo.adobeconnect.com/summit1/
  1:30pm - 3:25pm

• Loan Application Data Exchange DWG
  Conference Line (855) 260-5550 Code: 5733959
  Adobe Connect URL http://mismo.adobeconnect.com/summit5/
  1:30pm - 3:25pm

• eMortgage CoP
  Conference Line (855) 260-5550 Code: 4732510
  Adobe Connect URL http://mismo.adobeconnect.com/summit2/
  1:30pm - 4:25pm

• Mortgage Insurance CoP
  Conference Line (855) 260-5550 Code: 1930188
  Adobe Connect URL http://mismo.adobeconnect.com/summit4/
  1:30pm - 5:25pm

• Blockchain CoP
  Conference Line (855) 260-5550 Code: 2972814
  Adobe Connect URL http://mismo.adobeconnect.com/summit3/
  3:30pm - 5:25pm

• Decision Modeling CoP
  Conference Line (855) 260-5550 Code: 7397675
  Adobe Connect URL http://mismo.adobeconnect.com/summit5/
  3:30pm - 5:25pm

• Servicing CoP
  Conference Line (855) 260-5550 Code: 8209535
  Adobe Connect URL http://mismo.adobeconnect.com/summit1/
  3:30pm - 5:25pm

• Verifiable SmartDoc DWG
  Conference Line (855) 260-5550 Code: 8488481
  Adobe Connect URL http://mismo.adobeconnect.com/summit2/
  4:30pm - 5:25pm

• Wrap Up
  Conference Line: 855-260-5550 Code: 5572940
  Adobe Connect URL http://mismo.adobeconnect.com/mismo_meeting/
  5:30pm – 5:55pm

• Council of Chairs (Invitation Only)
  6:00pm – 7:00pm
Thursday, September 3rd

Education Sessions

The A-Z of Servicing Transfers
11:00am – 11:45am EST

Some say that high volumes of servicing transfers are inevitable given current conditions. If so, what do experts say that the industry should be doing right now to prepare and reduce friction with processes? Join expert industry representatives to hear the latest thinking.

Moderator: Pat Taylor, Managing Director, New Directions Consulting Services

Featured Speakers:
- Frank Ciesielski, Vice President Servicing Transfers, Round Point Mortgage
- Karan Kaul, Senior Research Associate in the Housing Finance Policy Center, Urban Institute
- Prasant Sar, Manager, Servicing Policy and Asset Management, Federal Housing Finance Agency

Some Like it Hot
11:45am – 12:30pm EST

Standards make innovation possible and provide a path forward during times of uncertainty. MISMO standards and resources can enable your organization to accelerate development of new and innovative solutions. Join this session to learn about recently, and soon to be released, standards and resources your organization should be adopting today.

Featured speakers:
- Kyle Bensen, Independent Consultant
- Shawn Jobe, Director Software Development, Factual Data
- Christopher Stookey, Software Senior Engineer, Wells Fargo
- Domenic Virgilio, Solutions Architect, United Wholesale Mortgage

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

- **Origination CoP**
  Conference Line (855) 260-5550 Code: 6916551

- **Logical Data Dictionary DWG**
  Conference Line (855) 260-5550 Code: 5742490
- **Private Label DWG**  
  1:30pm - 5:25pm  
  Conference Line: (855) 260-5550 Code: 3122728  

- **eDoc/eMortgage Vault DWG**  
  3:30pm - 5:25pm  
  Conference Line: (855) 260-5550 Code: 0341097  
  Adobe Connect URL: [http://mismo.adobeconnect.com/summit1/](http://mismo.adobeconnect.com/summit1/)

- **Property & Valuation CoP**  
  3:30pm - 5:25pm  
  Conference Line: (855) 260-5550 Code: 4364129  

- **Wrap Up**  
  5:30pm – 5:55pm  
  Conference Line: 855-260-5550 Code: 5572940  
  Adobe Connect URL: [http://mismo.adobeconnect.com/mismo_meeting/](http://mismo.adobeconnect.com/mismo_meeting/)