MISMO SPRING SUMMIT
AGENDA

June 7-10, 2021
Virtual Online Event

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Coffee Chat Sponsors
Monday, June 7th

Monday’s Educational Sessions: Innovation in a Digital World and MISMO and the Industry’s Digital Transformation: 5 Key Developments for 2021 are OPEN to the Press. All other Summit Content is CLOSED to the press.

Innovation in a Digital World
11:00am – 11:50am EST

Join this session featuring a “fireside chat” with Sultan Meghji, Chief Innovation Officer at the FDIC and MISMO’s President Seth Appleton as they discuss innovation in a digital world.

Panelists:
- Seth Appleton, President, MISMO
- Sultan Meghji, Chief Innovation Officer, FDIC

MISMO and the Industry’s Digital Transformation: 5 Key Developments for 2021
11:50am – 12:30pm EST

Listen as industry experts discuss progress on 5 key initiatives including API Toolkit; remote online notarization (RON); servicing transfers; SMART Docs and the Industry Loan Application Dataset (ILAD).

Moderator: Matthew Tully, Senior Vice President, Agency Affairs and Compliance, Sagent
Panelists:
- Rachael Sokolowski, President, Magnolia Technologies, LLC
- Camelia Martin, Head of Industry and Regulator Affairs, Snapdocs
- Joey Prince, Senior Director Loan Transfers and Servicing Operations, NewRez LLC
- Leslie Malicki, Business Partner Relationships Manager, MGIC
- John Haring, Director Product Management, Ice Mortgage Technologies

Monday Community of Practice (CoP) and Development Workgroup (DWG) Meetings:
All Listed Times in EST

- Newcomer Orientation 12:45pm - 1:15pm
- Credit Reporting CoP 1:30pm - 3:25pm
- Fee Collaboration DWG 1:30pm - 3:25pm
- Residential Appraisal DWG 1:30pm - 3:25pm
Tuesday, June 8th
Tuesday's Educational Sessions are Closed to the Press

Coffee Talk - One New Loan Application, One Big Step for Digital
10:00am - 10:30am EST

Join this interactive conversation with industry experts from Roostify and MBA as we explore the roll-out of the new loan application and its impact on the mortgage industry’s journey from paper to digital.

Panelists:
- Rick Hill, VP Industry Technology, MBA
- Chris Boyle, President of Home Lending - Voice of Customer, Roostify
- Roger Fendelman, Chief Compliance Officer - Voice of Industry Regulation, Roostify
- Harsh Chowdhary, Director of Product Management - Voice of Tech and Data Strategy, Roostify

Coffee Talk Sponsored by: Roostify

What Does Going Digital Really Mean and How Do You Get There?
11:00am – 12:30pm EST

Part 1: STRATMOR Senior Partner Garth Graham leads us through his findings on how the industry is progressing with its move from paper to digital.
Part 2: Nancy Alley, Vice President Strategic Planning, ICE Mortgage Technologies will lead a panel of lending executives through a discussion on what the research means to lenders, key steps and strategies for going digital including what works and what doesn’t. If your organization is on, or contemplating, a journey to move to digital, you won’t want to miss this important session.

Moderator: Nancy Alley, Vice President Strategic Planning, ICE Mortgage Technologies
Panelists:

- Mark Langhans, Chief Information Officer, Union Home Mortgage
- Suzy Lindblom, Chief Operating Officer, Kind Lending
- Jerry Selitto, President, Better Mortgage

Tuesday Community of Practice (CoP) and Development Workgroup (DWG) Meetings:
All Listed Times in EST

- Title & Closing CoP 1:30pm - 2:25pm
- Architecture Work Group 1:30pm – 3:25pm
- Business Glossary DWG 1:30pm - 3:25pm
- Credit Reporting CoP 1:30pm - 3:25pm
- FIPS Code DWG 3:30pm - 5:25pm
- Emerging Technologies CoP 3:30pm - 5:25pm
- Residential Appraisal DWG 3:30pm - 5:25pm
- Servicing Transfers DWG 3:30pm - 5:25pm
- Daily Wrap-Up 5:30pm – 5:55pm
Coffee Talk - The Pace of Digital Adoption: A Conversation
10:00 - 10:30am EST

Why did your organization decide to digitize? Have you engaged key stakeholders in the process? What processes have been digitized so far? What processes would be most impactful to digitize? What is next on your organizations’ digital roadmap? Share your answers to these and other questions via online polling and engage in an interactive discussion on the implications of poll results.

Session facilitators:
- Jonathan Kearns, VP Product, MISMO
- Ty Cieloha, Account Director, Qualia

Coffee Talk Sponsored by Qualia

Emerging Technologies and Trends:
What Do They Mean for Your Organization?
11:00am – 11:50am EST

Join moderator, Tim Elkins, EVP and Chief Production Officer at PrimeLending, as he asks our panel of experts their thoughts on where technology is going; what trends they are seeing; and what might this mean for those of us in mortgage?

Moderator: Tim Elkins, EVP and Chief Production Officer, PrimeLending
Panelists:
1. Ryan Battles, Banking & Capital Markets Technology Delivery Leader, EY
2. Jeremy Potter, Senior Director, Strategy and Innovation, Quicken Loans
3. Haris Ikram, Head of Product Management, Blend

Driving Decisions with Trusted Data
11:50am – 12:30pm EST

How many times does the same data get checked and rechecked and then checked again? Join this session to hear industry experts explore the problem and related impacts; available solutions; and review a real live industry case study showing how impactful driving decisions with trusted data can be.

Moderator: Shawn Jobe, Director of Software Development, Factual Data
Panelists:
- Selim Aissi, SVP and CISO, ICE Mortgage Technology
- Rishi Godse, Technical Architect, USAA
- Ike Suri, Chairman and CEO, FundingShield, LLC
Gary Weingarden, Data Protection Officer, Notarize

**Wednesday Community of Practice (CoP) and Development Workgroup (DWG) Meetings:**
**All Listed Times in EST**

- **Business Reference Model CoP**
  1:30pm - 3:25pm

- **Closing Instructions DWG**
  1:30pm - 3:25pm

- **Loan Application Data Exchange DWG**
  1:30pm - 3:25pm

- **eMortgage CoP**
  1:30pm - 4:25pm

- **Blockchain CoP**
  3:30pm - 5:25pm

- **Decision Modeling CoP**
  3:30pm - 5:25pm

- **Servicing CoP**
  3:30pm - 5:25pm

- **Verifiable SmartDoc DWG**
  4:30pm - 5:25pm

- **Daily Wrap-Up**
  5:30pm – 5:55pm

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**Thursday, June 10th**
*Thursday’s Educational Sessions are Closed to the Press*

**Coffee Talk - Lead through Disruption: How to Win the Purchase Market**
10:00am - 10:30am EST

Lenders must adapt to deliver increased revenue in a rapidly evolving and competitive marketplace. LO’s have the challenging job of juggling the realtor’s and borrower’s needs 24/7, the guidelines and policies of the agencies and their investors, market conditions and rates, as well as constantly prospecting for new business. In a highly competitive purchase market, getting a mortgage is chaotic with at least a dozen different parties involved in the process trying to communicate with each other. Join us for a conversation on the strategic initiatives lenders are taking to simplify the
origination and closing process for everyone involved and what it means for the digital transformation of the housing finance industry.

Panelists:

- **Seth Appleton**, President, MISMO
- **Paul Drobot**, Vice President Sales, SimpleNexus
- **Shane Westra**, Vice President Product, SimpleNexus

**Coffee Talk Sponsored by**  
**SIMPLENEXUS**

**Going Digital to Reach the Underserved**  
11:00am – 11:50am EST

It has never been more important to find new and creative ways to reach the underserved. Moderated by Steve O’Connor, SVP for Affordable Housing Initiatives at MBA, attend this session to hear from the experts about the challenges, opportunities, and initiatives in this space including efforts to develop a standardized dataset to facilitate the exchange of housing counseling data.

**Moderator**: Steve O’Connor, SVP for Affordable Housing Initiatives, MBA  
**Panelists**:

- **Bruce Dorphalen**, Executive Director, National Housing Resource Center
- **Amanda Richardson**, Senior Product Development Manager, Genworth Mortgage Insurance
- **David Young**, Director of Capacity Building, Housing Action Illinois

**Agency Spotlight: GSE Updates**  
11:50am – 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.

**Speakers**:

- **James Babalitis**, Senior Manager, Fannie Mae  
- **Colleen Flaxington**, Director, Industry Standards, 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

**Thursday Community of Practice (CoP) and Development Workgroup (DWG) Meetings**:  
*All Listed Times in EST*
• **Logical Data Dictionary DWG** 1:30pm - 3:25pm

• **Origination CoP** 1:30pm - 3:25pm

• **Private Label DWG** 1:30pm - 5:25pm

• **Mortgage Insurance CoP** 1:30pm - 5:25pm

• **eDoc/eMortgage Vault CoP** 3:30pm - 5:25pm

• **Property & Valuation CoP** 3:30pm - 5:25pm

• **Daily Wrap-Up** 5:30pm – 5:55pm

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