



---

## MISMO SPRING SUMMIT AGENDA

June 7-10, 2021  
Virtual Online Event

*Thank You to our Sponsors:*



## **Monday, June 7<sup>th</sup>**

Monday's Educational Sessions are **Open** to the Press



**SAGENT**  
Sponsor of Monday's Educational Content

### **Innovation in a Digital World**

11:00am – 11:45am

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**

11:45am – 12:30pm

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, 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***

- 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**
- [Secondary CoP](#) **1:30pm - 3:25pm**
- [API CoP](#) **3:30pm - 5:25pm**

- [Business Reference Model CoP](#) 1:30pm - 3:25pm
  - [Remote Online Notarization DWG](#) 3:30pm – 5:25pm
  - [Data Governance CoP](#) 4:30pm - 5:25pm
  - Daily Wrap-Up 5:30pm – 5:55pm
  - Joint Committee Meeting\_(Invitation Only) 6:00pm – 7:00pm
- 

## **Tuesday, June 8<sup>th</sup>**

Tuesday's Educational Sessions are **Closed** to the Press

### **What Does Going Digital Really Mean and How Do You Get There?**

11:00am – 12:30pm



**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***

- [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
- Reception and Talent Show 6:00pm – 7:00pm

### **Wednesday, June 9<sup>th</sup>**

*Wednesday's Educational Sessions are **Closed** to the Press*



Sponsor of Wednesday's Educational Content

#### **Emerging Technologies and Trends: What Do They Mean for Your Organization?**

11:00am – 11:45am

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**

11:45am – 12:30pm

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**

- |  |                        |
|--|------------------------|
| • <a href="#">Business Reference Model CoP</a>       | <b>1:30pm - 3:25pm</b> |
| • <a href="#">Closing Instructions DWG</a>           | <b>1:30pm - 3:25pm</b> |
| • <a href="#">Loan Application Data Exchange DWG</a> | <b>1:30pm - 3:25pm</b> |
| • <a href="#">eMortgage CoP</a>                      | <b>1:30pm - 4:25pm</b> |
| • <a href="#">Blockchain CoP</a>                     | <b>3:30pm - 5:25pm</b> |
| • <a href="#">Decision Modeling CoP</a>              | <b>3:30pm - 5:25pm</b> |
| • <a href="#">Servicing CoP</a>                      | <b>3:30pm - 5:25pm</b> |
| • <a href="#">Verifiable SmartDoc DWG</a>            | <b>4:30pm - 5:25pm</b> |
| • Daily Wrap-Up                                      | <b>5:30pm – 5:55pm</b> |

---

**Thursday, June 10<sup>th</sup>**

*Thursday's Educational Sessions are **Closed** to the Press*



## Going Digital to Reach the Underserved

Sponsor of Thursday's Educational Content

11:00am – 11:45am 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

11:45am – 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

- [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**

---

Follow us on LinkedIn and Twitter:

