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MISMO Fall Summit  
Agenda

September 18<sup>th</sup> – 21<sup>st</sup>, 2023  
Washington, DC

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# Monday September 18<sup>th</sup>

***NOTE TO PRESS:*** Monday's Educational Sessions and each of the Coffee Chats throughout the week are **OPEN** to the Press. ALL other sessions (including Workgroup meetings) are **CLOSED** to the press.

## Educational Content

Note: All times listed in Eastern Time (EST)

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### **Breakfast**

Time: 7:30am – 9:00am

Room: Chesapeake View

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Opening Remarks 9:00 - 9:05am

### **Conversation with FHA Commissioner Julia Gordon**

Time: 9:05am – 9:50am

Room: Regency AB

MISMO President David Coleman will sit down with the Honorable Julia Gordon, Assistant Secretary for Housing and Federal Housing Commissioner, to talk about work underway within HUD's Office of Housing and the Federal Housing Administration to increase housing supply and affordability and enhance operational efficiencies for stakeholders.

#### Speakers

- David Coleman, President, MISMO
- Julia Gordon, Assistant Secretary for Housing and FHA Commissioner

### **Themes and Outcomes from the FHFA Velocity Tech Sprint**

Time: 9:50am – 10:15am

Room: Regency AB

Imagine ten teams of the best of the best mortgage industry professionals competing to identify and pitch ground-breaking ideas for transforming the mortgage process. That's right – think Shark Tank for mortgage except these folks were competing for pride. Which ideas rose above the rest? What themes evolved over the course of the Sprint? Want to know more? Join this session for answers!

#### Speakers

- Jan Davis, Vice President Operations, MISMO
- Anne Marie Pippin, Associate Director, Office of Financial Technology, FHFA

Break 10:15 - 10:45am

## Navigating the ESG Landscape: What Does it Mean for Your Company?

Time: 10:45am – 12:00pm

Room: *Regency AB*

Strap on your seatbelt and let our experts take you on a journey through a host of environmental, social, and governance (ESG) activities and issues impacting mortgage finance today and what they may mean for your company.

### Moderator

- Martha-Rosalind (“MR”) Stainton, Partner, Potomac Point Group

### Panelists

- Courtenay Dunn, Senior Director, Government Affairs, ICE Mortgage Technology
- Suzanne Garwood, Executive Director and Associate General Counsel, JPMorgan Chase
- Jamie Miller, Single Class Security Issuance Senior Director, Freddie Mac
- Dallin Merrill, Senior Director of MBS and CMBS policy, SFA

## Newcomer Orientation

Time: 12:30pm – 1:25pm

Room: *Washington Room*

Never been to a Summit before? Bring your lunch and attend this session to learn what to expect from the experience. Opportunities to be paired with an experienced MISMO Ambassador will be provided.

Break 12:00 - 1:30pm

## 2024 and Beyond: What MBA Economists are Expecting

Time: 1:30pm – 2:15pm

Room: *Regency AB*

Wishing you had a crystal ball to understand when the market will get back on its feet? Join us for the next best thing, a fireside chat with MBA’s own Joel Kan, VP and Deputy Chief Economist.

### Speaker

- Joel Kan, Vice President, Deputy Chief Economist, Research & Industry Technology, MBA

## Charting Your Path to Success with Upcoming Credit Score Changes

Time: 2:15pm – 3:00pm

Room: *Regency AB*

By now you've heard that there are credit score model and credit score reporting changes required by FHFA. But have you considered what those changes mean from an implementation perspective? What do they mean for industry and partner information exchanges? Where might credit scores be used within your internal business processes and systems? Join this session where industry experts will explore the paths credit scores take traversing industry, partner and internal systems and processes.

### Moderator:

- Rick Hill, Vice President Industry Technology, MBA

### Panelists:

- Seth Appleton, President, US Mortgage Insurers
- Jan Davis, Vice-President, Operations, MISMO
- Dan Fichtler, Senior Advisor, FHFA
- Shawn Jobe, Vice President, Head of Business Development, Informative Research
- Piper Beveridge, Vice President, Strategic Relations, ICE Mortgage Technology
- Cory Bland, Mgr. Mortgage Pricing and Investor Relations, Navy Federal Credit Union

Break 3:00-3:30pm

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## GSE and Housing Agency Updates

Time: 3:30pm – 4:45pm

Room: *Regency AB*

Tune into this session for an opportunity to hear the latest from the GSEs and housing agency representatives about their work. Representatives will provide an update and answer questions.

### Panelists:

- David Barkley, Director, Business Initiatives, Freddie Mac
- James Babalitis, Senior Manager, Single Family Digital Products, Fannie Mae
- Migdaliz Bernier, Director, Home Mortgage Insurance Division, FHA
- Elizabeth Bowser, Product Management, Fannie Mae
- Colleen Flaxington, Director, Industry Standards, Freddie Mac
- Mark Friend, Product Management, Fannie Mae
- Nicole Jackson, Management Information Specialist, Office of Enterprise Data & Technology Solutions, Ginnie Mae
- Sunil Vaid, Manager Industry Standards, Freddie Mac

## Closing Remarks 4:45 - 4:50pm

### Evening Reception

Everyone is invited to the Monday evening Spring Summit reception. Come meet up with old friends and make some new ones. Don't miss this opportunity to network and celebrate MISMO.

*Time:* 5:00pm – 6pm

*Room:* Tidewater Foyer

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## Tuesday, September 19<sup>th</sup>

*All times Listed in EST*

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### Breakfast

Time: 7:30am – 9:00am

Room: Chesapeake View - Rooftop

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### Coffee Talk - Gaining Efficiencies: Use Cases for Applying Artificial Intelligence (AI) to Your Operations

Time: 8am – 8:45am  
Room: Conference Theatre

AI may be the talk of the town but AI in general has been in existence, and in production, for years. Join this session to hear experts from across the industry explain and expand on the current/potential use cases for leveraging AI to make your eMortgage operations more efficient.

**Moderator:** Jay Arneja, Vice President Product Manager, SimpleNexus

**Panelists:**

- Harry Gardner, Director of Digital Services, ICE Mortgage Technology
- Brian Pannell, PMP Chief eServices Executive, DocMagic
- Brian Webster, President, NotaryCam, Inc.

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## MISMO Boot Camp

MISMO's Boot Camp Course streamlines the education process for both technical and business professionals to understand how MISMO operates and develops standards, MISMO's Core Components and how to leverage them to meet industry challenges, the components of MISMO's XML reference model how it works and much more! Pass the Boot Camp exam to qualify for your [Associate MISMO Standards Professional](#) certification.

[Register now!](#)

Time: 9:00am – 4:30pm

Room: Jefferson

Coffee Break: 10:20am – 10:40am

Coffee Break: 2:50pm – 3:10pm

<i>Tuesday Community of Practice (CoP) and Development Workgroup (DWG) Meetings</i>		
<i>Workgroup meetings will take breaks from 10:20am – 10:40am and 2:50pm – 3:10pm</i>		
<u>Name</u>	<u>Room</u>	<u>Time (EST)</u>
<a href="#">eMortgage CoP</a>	Conference Theater	9:00am – 12:00pm
<a href="#">Blockchain CoP</a>	Tidewater II	9:00am – 12:00pm
<a href="#">Architecture Workgroup</a>	Tidewater III	9:00am – 12:00pm
<a href="#">Business Process Model CoP</a>	Roosevelt	9:00am – 12:00pm
<a href="#">Closing Instructions DWG</a>	Lincoln	9:00am – 12:00pm
<b>Break</b>		12:00pm – 1:30pm
<a href="#">eMortgage CoP</a>	Conference Theater	1:30pm – 2:50pm
<a href="#">Regulatory Compliance DWG</a>	Tidewater III	1:30pm – 2:50pm
<a href="#">Blockchain CoP</a>	Tidewater II	1:30pm – 2:50pm
<a href="#">Title Pricing API DWG</a>	Roosevelt	1:30pm – 4:30pm
<a href="#">Mortgage Insurance CoP</a>	Lincoln	1:30pm – 4:30pm
<a href="#">eDoc/eMortgage Vault Interoperability CoP</a>	Conference Theater	3:10pm – 4:30pm

<b>New Product Incubator – Invitation Only</b>	Tidewater II	<b>3:10pm – 4:30pm</b>
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### Evening Reception

Everyone is invited to the Tuesday evening Spring Summit reception, come meet up with old friends and make some new ones. Don't miss this opportunity to network and celebrate MISMO.

*Time:* 4:45pm-5:45pm

*Room:* Cinnabar

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## Wednesday, September 20<sup>th</sup>

*All times Listed in EST*

### Breakfast

*Time:* 7:30am – 9:00am

*Room:* Chesapeake View - Rooftop

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## **Credit Reporting CoP – FHFA Credit Score Change Working Session**

*Time: 9am – 4:30pm*  
*Room: Conference Theatre*

### **Introduction and group orientation**

*9:00am-9:30am*

### **Exploring the Implementation Impact of Credit Score Model and Reporting Changes**

*9:30am-12:00pm; 1:30pm-4:30pm*

This working session is an opportunity to roll up your sleeves and dive into the new requirements, discuss potential impacts to existing standards and industry information exchanges. What do the changes mean for industry and partner information exchanges? What information is needed to support implementation? Help us get to the answers to these important questions.

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

**Workgroup meetings will take breaks from 10:20am – 10:40am and 2:30pm – 2:50pm**

<b><u>Name</u></b>	<b><u>Room</u></b>	<b><u>Time (EST)</u></b>
<a href="#">Credit Reporting CoP</a>	Conference Theater	9:00am – 12:00pm
<a href="#">eHELOC DWG</a>	Tidewater II	9:00am – 12:00pm
<a href="#">Regulatory Compliance DWG</a>	Tidewater III	9:00am – 12:00pm
<a href="#">API CoP</a>	Roosevelt	9:00am – 12:00pm
<a href="#">Decision Modeling CoP</a>	Lincoln	9:00am – 12:00pm
<b>Break</b>		12:00pm – 1:30pm
<a href="#">Data Governance and Management CoP</a>	Roosevelt	1:30pm – 3:10pm
<a href="#">Credit Reporting CoP</a>	Conference Theater	1:30pm – 4:30pm
<a href="#">Verifiable SMART Docs DWG</a>	Tidewater II	1:30pm – 4:30pm
<a href="#">Originations CoP</a>	Roosevelt	3:10pm – 4:30pm

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# Thursday, September 21<sup>st</sup>

*All times Listed in EST*

## Breakfast

Time: 7:30am – 9:00am

Room: Chesapeake View - Rooftop

*Sponsored By:* **Stavvy**

Coffee Break: 10:20am – 10:40am

Coffee Break: 2:50pm – 3:10pm

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

*Workgroup meetings will take breaks from 10:20am – 10:40am and 2:50pm – 3:10pm*

<u>Name</u>	<u>Room</u>	<u>Time (PST)</u>
e-Eligibility Exchange Forum	Tidewater III	9:00am – 10:20am
<a href="#">Secondary CoP</a>	Lincoln	9:00am – 10:20am
<a href="#">Business Glossary CoP</a>	Prince William	9:00am – 12:00pm
<a href="#">ESG CoP</a>	Roosevelt	9:00am – 12:00pm
<a href="#">Reverse Mortgage DWG</a>	Tidewater II	9:00am – 12:00pm
<a href="#">Remote Online Notarization DWG</a>	Tidewater III	10:40am – 12:00pm
<a href="#">Servicing CoP</a>	Lincoln	10:40am – 12:00pm
<b>Break</b>		12:00pm – 1:30pm
<a href="#">PAVs CoP</a>	Lincoln	1:30pm – 2:50pm
<a href="#">Title and Closing CoP</a>	Prince William	1:30pm – 2:50pm
<a href="#">Commercial CoP</a>	Roosevelt	1:30pm – 4:30pm

<a href="#">eVault Standards DWG</a>	Tidewater III	1:30pm – 4:30pm
<a href="#">Servicing Transfers DWG</a>	Tidewater II	1:30pm – 4:30pm
<a href="#">Housing Counseling DWG</a>	Lincoln	3:10pm – 4:30pm

**Council of Chairs Forum Luncheon *(Invitation Only)***

*Time:* 12:00pm – 1:25pm

*Room:* Chesapeake View - Rooftop

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