



MISMO Fall Summit Agenda

September 18th – 21st, 2023
Washington, DC

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The DART logo features the word "DART" in a bold, blue, sans-serif font. The letter "A" is stylized with a white triangle pointing upwards.



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The Actualize Consulting logo features a yellow star icon followed by the text "Actualize Consulting" in a blue, sans-serif font.



The MGIC logo features the letters "MGIC" in a bold, black, sans-serif font.

The PHOENIXTEAM logo features the word "PHOENIXTEAM" in a blue, sans-serif font, with a stylized "P" and "T".

The SAGENT logo features a blue "S" icon followed by the word "SAGENT" in a blue, sans-serif font.

The SIMPLENEXUS logo features a stylized "S" icon followed by the word "SIMPLENEXUS" in a bold, black, sans-serif font. Below it, in smaller text, is "an incino company".

The Stavvy logo features the word "Stavvy" in a bold, black, sans-serif font.

The Veterans United Home Loans logo features a stylized American flag icon followed by the text "Veterans United Home Loans" in a blue, sans-serif font.

Monday September 18th

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)

Breakfast

Time: 7:30am – 9:00am

Room: Chesapeake View

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MGIC

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, 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, Manager, Pricing Desk and GSE Reform, 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

Sponsored By:



Tuesday, September 19th

All times Listed in EST

Breakfast

Time: 7:30am – 9:00am

Room: Chesapeake View - Rooftop

Sponsored By:



Coffee Talk - TBA

Time: 8am – 8:45am

Room: TBA

Description TBA

Sponsored By:



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

Tuesday 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 (EST)</u>
eMortgage CoP	Conference Theater	9:00am – 12:00pm
Blockchain CoP	Tidewater II	9:00am – 12:00pm
Architecture Workgroup	Tidewater III	9:00am – 12:00pm
Business Process Model CoP	Roosevelt	9:00am – 12:00pm
Closing Instructions DWG	Lincoln	9:00am – 12:00pm
Break		12:00pm – 1:30pm
eMortgage CoP	Conference Theater	1:30pm – 2:50pm
Regulatory Compliance DWG	Tidewater III	1:30pm – 2:50pm
Blockchain CoP	Tidewater II	1:30pm – 2:50pm
Title Pricing API DWG	Roosevelt	1:30pm – 4:30pm
Mortgage Insurance CoP	Lincoln	1:30pm – 4:30pm
eDoc/eMortgage Vault Interoperability CoP	Conference Theater	3:10pm – 4:30pm

Loan Application Dataset DWG	Tidewater III	3:10pm – 4:30pm
New Product Incubator – Invitation Only	Tidewater II	3:10pm – 4:30pm

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

Sponsored By: 

Wednesday, September 20th

All times Listed in EST

Breakfast

Time: 7:30am – 9:00am

Room: Chesapeake View - Rooftop

Sponsored By:



Coffee Talk - TBA

Time: 8am – 8:45am

Room: TBA

Content TBA

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.

Coffee Break: 10:20am – 10:40am

Coffee Break: 2:50pm – 3:10pm

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

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

Thursday, September 21st

All times Listed in EST

Breakfast

Time: 7:30am – 9:00am

Room: Chesapeake View - Rooftop

Coffee Talk – TBA

Time: 8am – 8:45am

Room: TBA

Content TBA

Sponsored By:



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
Secondary CoP	Lincoln	9:00am – 10:20am
Business Glossary CoP	Prince William	9:00am – 12:00pm
ESG CoP	Roosevelt	9:00am – 12:00pm

Reverse Mortgage DWG	Tidewater II	9:00am – 12:00pm
Remote Online Notarization DWG	Tidewater III	10:40am – 12:00pm
Servicing CoP	Lincoln	10:40am – 12:00pm
Break		12:00pm – 1:30pm
PAVs CoP	Lincoln	1:30pm – 2:50pm
Title and Closing CoP	Prince William	1:30pm – 2:50pm
Commercial CoP	Roosevelt	1:30pm – 4:30pm
eVault Standards DWG	Tidewater III	1:30pm – 4:30pm
Servicing Transfers DWG	Tidewater II	1:30pm – 4:30pm
Housing Counseling DWG	Lincoln	3:10pm – 4:30pm
Title and Closing Docs to Data DWG	Prince William	3:10pm – 4:30pm

Council of Chairs Forum Luncheon *(Invitation Only)*

Time: 12:00pm – 1:25pm

Room: Chesapeake View - Rooftop

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