



MISMO Winter Summit
Agenda

January 9th – 12th, 2023
Delray Beach, FL

Thank You to our Sponsors:

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Monday, January 9th

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 Daylight Time (ET)

Breakfast

Time: 7:30am – 9:00am

Room: The Garden/Seabreeze

Opening Remarks: 9:00am – 9:05am

Tech Talk: The Survey Says...

9:05am – 9:35am

Virtual: Via Livestream

Room: Salon DEF

The results are in – and inquiring minds want to know. Are your peers prioritizing tech? Are tech investments on hold? What might these results mean for your organization and the mortgage industry? Hear insights from MBA's Research and Technology Team about the latest findings from MBA's Technology Survey that answer these questions and more.

- Presenter: Jenny Masoud, Director Analytics, MBA

Special Session: What Does the New FHFA Office of Financial Technology Mean for Industry?

9:35am – 10:35am

Virtual: Via Livestream

Room: Salon DEF

Join this session to meet the new leader of the FHFA Office of Financial Technology, Jason Cave, Deputy Director, FHFA. Learn about priorities for the new office, industry responses to the RFI it published, and how standards fit into its work.

- Panelists:
 - Jason Cave, Deputy Director Office of Conservatorship Oversight and Readiness, FHFA
 - Rick Hill, Vice President Industry Technology, MBA
 - Steve Powel, Executive Chairman, SitusAMC

Coffee Break: 10:40am – 11:00am *Sponsored By:*  **Actualize Consulting**

**Making Mortgage More Efficient: MISMO Tools and
Resources Showcase**

11:00am – 12:00pm

Virtual: *Via Livestream*

Room: Salon DEF

Join us for a showcase of the latest tools and resources that can help your organization improve efficiency and reduce costs for originating, selling, and servicing loans.

- Panelists: TBD

Break: 12:00pm – 1:30pm

Newcomer Orientation

Time: 12:30pm – 1:25pm

Room: *Salons ABC*

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.

**Getting the Most out of Your Digital Mortgage Investment:
Digital Success Stories**

1:30pm – 2:30pm

Virtual: *Via Livestream*

Room: *Salon DEF*

The rumors are true! Lenders who invest in digital are seeing substantial cost savings today on every digital mortgage they manufacture. How did they do it? Join this session to hear directly from the folks who made it happen.

- Panelists: TBD

Break: 2:30pm – 3:00pm

GSE and Government Agency Updates

3:00pm – 3:45pm

Virtual: Via Livestream

Room: Salon DEF

Tune into this session for an opportunity to hear the latest from the GSEs and the Agencies about their work. Representatives from Fannie Mae, Freddie Mac, and other Agency partners will provide an update and answer questions.

- Panelists: TBD

Tech Environment Today – What to do to Survive and Thrive

3:45pm – 4:45pm

Virtual: Via Livestream

Room: Salon DEF

Given current market conditions some organizations are moving to survival mode while others are taking advantage of the break in volumes to invest in new technology for the future. Join our panel of experts for a discussion of talent, strategy, and technology considerations for these scenarios and more. You can't afford to miss this session!

- Panelists: TBD

Closing Remarks: 4:45pm – 5:00pm

Tuesday, January 10th

All times Listed in ET

Breakfast

Time: 7:30am – 9:00am

Room: The Garden/Seabreeze

Sponsored By:  Veterans United.
Home Loans

Coffee Talk – TBA

Time: 8am – 8:45am

Room: Salon D

Coffee Talk Details TBA

Coffee Break: 10:40am – 11:00am *Sponsored By:*



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>
<u>API CoP</u>	Salon EF	9:00am – 12:00pm
<u>Business Process Model CoP</u>	Salon BC	9:00am – 12:00pm
<u>Closing Instructions DWG</u>	Salon A	9:00am – 12:00pm
<u>Credit Reporting CoP</u>	Coral Reef Salon 1	9:00am – 12:00pm
<u>ESG CoP</u>	Salon D	9:00am – 12:00pm
Break		12:00pm – 1:30pm

Business Glossary CoP	Salon BC	1:30pm – 2:50pm
Blockchain CoP	Salon EF	1:30pm – 4:30pm
Housing Counseling DWG	Salon D	1:30pm – 4:30pm
Mortgage Insurance CoP	Coral Reef Salon 1	1:30pm – 4:30pm
Private Label DWG	Salon A	1:30pm – 4:30pm
RON CoP	Salon BC	3:00pm – 4:30pm

Workgroup Daily Wrap-Up

Everyone is invited to the Daily Wrap-Up sessions where leaders of the workgroups that met that day provide a brief report out on what transpired in their meetings. The Wrap-Up provides a great opportunity to get a comprehensive perspective of MISMO's efforts.

Time: 4:45pm – 5:15pm

Room: Salon D

Evening Reception

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

Time: 5:30pm – 7pm

Room: Ocean Terrace

Sponsored By:  **snapdocs**

Annual MISMO Contributor Award Program

Come find out the identity of this year's winners and celebrate the notable members of our community.

Time: 6:30-7pm

Room: Ocean Terrace

Sponsored By: 

Wednesday, January 11th

All times Listed in ET

Breakfast

Time: 7:30am – 9:00am

Room: The Garden/Seabreeze

Coffee Talk – TBA

Time: 8am – 8:45am

Room: Salon D

Coffee Talk Details TBA

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>
Commercial eNotes / Commercial Adoption	Salon A	9:00am – 10:20pm
Secondary CoP	Salon BC	9:00am – 10:20pm
Title & Closing CoP	Carol Reef Salon 1	9:00am – 10:20pm
Decision Modelling CoP	Salon D	9:00am – 12:00pm
Servicing Transfers DWG	Salons EF	9:00am – 12:00pm
Data Governance & Management CoP	Salon A	10:40am – 12:00pm
E-Eligibility Exchange Forum	Salons BC	10:40am – 12:00pm

Title & Closing Docs to Data DWG	Coral Reef Salon 1	10:40am – 12:00pm
Break		12:00pm – 1:30pm
IM Brown Bag	Salon D	12:30pm – 1:25pm
Emerging Technologies CoP	Salon D	1:30pm – 2:50pm
Servicing Transfers DWG	Salon EF	1:30pm – 2:50pm
Regulatory Loan Examination DWG	Salon A	1:30pm – 3:00pm
eVault Standards DWG	Salons BC	1:30pm – 4:30pm
Property & Valuations Services CoP	Coral Reef Salon 1	1:30pm – 4:30pm
LADE DWG	Salon A	3:10pm – 4:30pm

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Time: 4:45pm – 5:15pm

Room: Salon D

Thursday, January 12th

All times Listed in ET

Breakfast

Time: 7:30am – 9:00am

Room: The Garden/Seabreeze

Sponsored By: **MGIC**

Coffee Talk - TBA

Time: 8am – 8:45am

Room: Salon D

Coffee Talk Details TBA

Sponsored By: **SIMPLENEXUS**
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Coffee Break: 10:20am – 10:40am

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 (EST)</u>
<u>Servicing CoP</u>	Salon A	9:00am – 10:20pm
<u>Architecture Work Group</u>	Salon D	9:00am – 12:00pm
<u>eMortgage CoP</u>	Salons EF	9:00am – 12:00pm
<u>Origination CoP</u>	Salon BC	9:00am – 12:00pm
Break		12:00pm – 1:30pm
<u>eMortgage CoP</u>	Salons EF	1:30pm – 2:50pm
<u>MISMO Next Gen DWG</u>	Salon D	1:30pm – 4:30pm
<u>Regulatory Loan Examination DWG</u>	Salons BC	1:30pm – 4:30pm
<u>eDoc/eMortgage Vault CoP</u>	Salons EF	3:10pm – 4:30pm

Council of Chairs Forum Luncheon *(Invitation Only)*

Time: 12:00pm – 1:25pm

Room: Ocean Breeze

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