



MISMO Winter Summit
Agenda

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

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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

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MGIC

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 MISMO tools and resources that can help your organization improve efficiency and reduce costs for originating, selling, and servicing loans.

- Moderator: Jonathan Kearns
- Steve Acker, Owner/Consultant, Closergeist
- Tammy Kienlen, Independent Consultant

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.

**eNote Outlets Beyond the GSEs:
The Who, What, Why, and When**

1:30pm – 2:30pm

Virtual: *Via Livestream*

Room: *Salon DEF*

eNotes have grown in popularity and now have many outlets available beyond the GSEs. Join this session to hear about your options directly from experts blazing the trail.

- Panelists:
 - Lynne Chandler, Digital Program Director, Ginnie Mae
 - Brian Pannell, Chief eServices Executive, DocMagic
 - Mike May, Chief Credit Officer, FHLB Pittsburgh
 - Leah Price, Vice President, Figure Lending / DART

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 Ginnie Mae about their work. Representatives will provide an update and answer questions. Be sure to also mark your calendar for the Tuesday Brown Bag session featuring updates from additional agencies including the VA.

- Panelists:
 - Beth Bowser, Project Lead, Fannie Mae
 - Colleen Flaxington, Director, Industry Standards, Freddie Mac
 - Mark Friend, Product Management, Fannie Mae
 - Nicole Jackson, Management Information Specialist, Ginnie Mae
 - Kasie Lynn, Manager Industry Standards, Freddie Mac

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!

- Moderator: Tammy Richards, CEO, LendArch
- Garth Graham, Senior Partner, STRATMOR Group
- Bill Packer, COO, Longbridge Financial
- Jason Pratt, Head of Mortgage Technology, USAA Federal Savings Bank

Closing Remarks: 4:45pm – 5:00pm

Tuesday, January 10th

All times Listed in ET

Breakfast

Time: 7:30am – 9:00am

Room: The Garden/Seabreeze

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Veterans United.
Home Loans

Coffee Talk – Thoughts on Issues Affecting Mortgage Origination

Time: 8am – 8:45am

Room: Salon D

Get to know Kevin Stevens, the Bureau’s newest senior manager in the Office of Mortgage Markets. Learn about Kevin’s background in the industry, including the role he played for close to two decades at FHA, about his new role at the Bureau, and the issues in mortgage origination that bring him to MISMO.

- Moderator: Angel R. Hernandez, VP Industry & Regulatory Affairs, Stavvy
- Kevin Stevens, Senior Manager, Office of Mortgage Markets, CFPB

Sponsored By:

Stavvy

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



Agency Updates Part 2 – Brown Bag

Time: 12:25pm – 1:25pm

Room: Salon D

Join us for “Part 2” of the Agency updates featuring updates from FHA and the VA. Representatives will provide an update and answer questions.

Tuesday Community of Practice (CoP) and Development Workgroup (DWG) Meetings

Learn more about what each group will be covering [here!](#)

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>
API CoP	Salon EF	9:00am – 12:00pm
Business Process Model CoP	Salon BC	9:00am – 12:00pm

Closing Instructions DWG	Salon A	9:00am – 12:00pm
Credit Reporting CoP	Coral Reef Salon 1	9:00am – 12:00pm
ESG CoP	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 DWG	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

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[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

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Wednesday, January 11th

All times Listed in ET

Breakfast

Time: 7:30am – 9:00am

Room: The Garden/Seabreeze

Coffee Break: 10:20am – 10:40am

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

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will be covering [here!](#)

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<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
Fee Collaboration DWG	Salon EF	3:00 – 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

Coffee Talk – Is eClose Adoption Part of Your 2023 Resolutions? What Do You Need to Do?

Time: 8am – 8:45am
Room: Salon D

2023 is here. The future is now. Is eClose adoption part of your 2023 New Year's resolutions? If so, join this session to hear tips from the experts on how to ensure your roadmap to success is complete.

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

Mike Cafferky, Principal eMortgages, Fannie Mae

Jonathan Kearns, Vice President Product, MISMO

Raj Penugonda, Product Development Director, Freddie Mac

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Coffee Break: 10:20am – 10:40am

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

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will be covering [here!](#)

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