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)

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Breakfast
Time: 7:30am – 9:00am
Room: The Garden/Seabreeze

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Opening Remarks: 9:00am – 9:05am

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Tech Talk: The Survey Says…
9:05am – 9:35am

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

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Special Session: What Does the New FHFA Office of Financial Technology Mean for Industry?
9:35am – 10:35am

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

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Coffee Break: 10:40am – 11:00am

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ActualizeConsulting
Making Mortgage More Efficient:
MISMO Tools and Resources Showcase
11:00am – 12:00pm

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

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
### GSE and Government Agency Updates

**3:00pm – 3:45pm**

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**

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, LendArc
- 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

Coffee Talk – Stavvy
Time: 8am – 8:45am
Room: Salon D

Coffee Talk Details TBA

Coffee Break: 10:20am – 10:40am

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

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<thead>
<tr>
<th>Name</th>
<th>Room</th>
<th>Time (EST)</th>
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<tbody>
<tr>
<td>API CoP</td>
<td>Salon EF</td>
<td>9:00am – 12:00pm</td>
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<tr>
<td>Business Process Model CoP</td>
<td>Salon BC</td>
<td>9:00am – 12:00pm</td>
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<td>Event</td>
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<tr>
<td>Closing Instructions DWG</td>
<td>Salon A</td>
<td>9:00am – 12:00pm</td>
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<tr>
<td>Credit Reporting CoP</td>
<td>Coral Reef Salon 1</td>
<td>9:00am – 12:00pm</td>
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<td>ESG CoP</td>
<td>Salon D</td>
<td>9:00am – 12:00pm</td>
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<td>Break</td>
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<td>Business Glossary CoP</td>
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<td>Blockchain CoP</td>
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<td>Mortgage Insurance CoP</td>
<td>Coral Reef Salon 1</td>
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<td>Private Label DWG</td>
<td>Salon A</td>
<td>1:30pm – 4:30pm</td>
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<td>RON DWG</td>
<td>Salon BC</td>
<td>3:00pm – 4:30pm</td>
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**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*

**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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[Snapdocs](#)

[DTO](#)
Wednesday, January 11th
All times Listed in ET

Breakfast
Time: 7:30am – 9:00am
Room: The Garden/Seabreeze

Coffee Break: 10:20am – 10:40am

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<tr>
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<tr>
<td><strong>Commercial eNotes / Commercial Adoption</strong></td>
<td>Salon A</td>
<td>9:00am – 10:20pm</td>
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<td><strong>Secondary CoP</strong></td>
<td>Salon BC</td>
<td>9:00am – 10:20pm</td>
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<tr>
<td><strong>Title &amp; Closing CoP</strong></td>
<td>Carol Reef Salon 1</td>
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<td><strong>Decision Modelling CoP</strong></td>
<td>Salon D</td>
<td>9:00am – 12:00pm</td>
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<td><strong>Servicing Transfers DWG</strong></td>
<td>Salons EF</td>
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<td><strong>Data Governance &amp; Management CoP</strong></td>
<td>Salon A</td>
<td>10:40am – 12:00pm</td>
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<td><strong>E-Eligibility Exchange Forum</strong></td>
<td>Salons BC</td>
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<td><strong>Title &amp; Closing Docs to Data DWG</strong></td>
<td>Coral Reef Salon 1</td>
<td>10:40am – 12:00pm</td>
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<td><strong>IM Brown Bag</strong></td>
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*Time*: 4:45pm – 5:15pm  
*Room*: Salon D

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### 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?

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

*Sponsored By:*

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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

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<tr>
<td>Servicing CoP</td>
<td>Salon A</td>
<td>9:00am – 10:20pm</td>
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<tr>
<td>Architecture Work Group</td>
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<td>9:00am – 12:00pm</td>
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<td>eMortgage CoP</td>
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<tr>
<td>Origination CoP</td>
<td>Salon BC</td>
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<tr>
<td>eMortgage CoP</td>
<td>Salons EF</td>
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<td>MISMO Next Gen DWG</td>
<td>Salon D</td>
<td>1:30pm – 4:30pm</td>
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<td>Regulatory Loan Examination DWG</td>
<td>Salons BC</td>
<td>1:30pm – 4:30pm</td>
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<tr>
<td>eDoc/eMortgage Vault CoP</td>
<td>Salons EF</td>
<td>3:10pm – 4:30pm</td>
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Council of Chairs Forum Luncheon *(Invitation Only)*

*Time*: 12:00pm – 1:25pm  
*Room*: Ocean Breeze

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