



Sponsored by



SAGENT

Servicing Transfer Standards & Data Workshop - AGENDA

Date: Tuesday, May 9th - 10:00 A.M. to 4 P.M. ET
Location: Fannie Mae Reston Town Center
2000 Opportunity Way, Reston, VA 20190
Registration: Registration is required. This is an in-person only event.

I. Welcome, Opening Remarks, The Role of MISMO

II. IPR Statement

"This meeting is governed by MISMO's Intellectual Property Rights and Antitrust Policies, which are posted on the MISMO web site at www.mismo.org. If you have any questions about these policies, please call 202-557-2880 and ask to speak to the MISMO Manager or send an email to info@mismo.org. By participating in this meeting, you are agreeing to be bound by these policies to ensure that this meeting is conducted according to the principles of integrity and fair play and in support of the best interests of mortgage industry."

III. Workshop Objectives

IV. Introductions

V. Comments from FHFA/CFPB

VI. Accomplishments - [MISMO Servicing Transfer Catalog](#) (MSTC)

- Our journey, the road ahead, and needs from the industry
- Review and adopt our Servicing Transfer Catalog (MSTC)

LUNCH SERVED

VII. Gather Data Standards Opportunities

- Openly discuss the need for data opportunities and pain points – *what, why*
- Benchmark against your processes, let's compare – *what's needed*
- Breakout and provide data standard 'areas of opportunity' - *with value scores*

BREAK (15 min)

VIII. Prioritize & Openly Validate Our Ideas

- Actively share and categorize documented opportunities

IX. Wrap Up & Next Steps

- Complete our simple 'Servicing Transfers Follow-up Survey' by Monday, 5/15/23.
- Review, comment, and adopt our [MISMO Servicing Transfer Catalog](#) (MSTC)
- Identify and resources from your organization to participate in the [MISMO Servicing Transfer Development Workgroup](#)
- Attend our [MISMO Spring Summit in Portland](#), OR (in-person or virtual)

X. Thank You & Adjourn Meeting