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## MISMO Spring Summit Agenda

June 3<sup>rd</sup> – 6<sup>th</sup>, 2024  
San Francisco, California

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## Monday, June 3<sup>rd</sup>

**NOTE TO PRESS:** Tuesday's Educational Sessions are **OPEN** to the Press. ALL other sessions (including Workgroup meetings) are **CLOSED** to the press.

Note: All times listed in Pacific (PST)

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### **Breakfast**

Time: 7:30am – 9:00am

Room: Atelier II

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

*Workgroup meetings will take breaks from 10:20am – 10:40am and 2:50pm – 3:10pm*

<b><u>Name</u></b>	<b><u>Room</u></b>	<b><u>Time (PST)</u></b>
<a href="#">Mortgage Insurance CoP</a>	Atelier I	9:00am – 12:00pm
<a href="#">Housing Counseling DWG</a>	Sculptor	9:00am – 12:00pm
<b>Break</b>		12:00pm – 1:30pm
<a href="#">Remote Online Notarization DWG</a>	Sculptor	1:30pm – 2:50pm
<a href="#">MI Claim Submission DWG</a>	Atelier I	1:30pm – 4:30pm
<a href="#">Title Pricing API DWG</a>	Sculptor	3:10pm – 4:30pm

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### **Evening Reception**

Everyone is invited to join us at MISMO's Monday reception. Don't miss this opportunity to network, celebrate MISMO.

Time: 5:00pm – 6:00pm

Room: Gallery Foyer

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## Tuesday, June 4<sup>th</sup>

*All times Listed in PST*

**NOTE TO PRESS:** Tuesday's Educational Sessions are **OPEN** to the Press. ALL other sessions (including Workgroup meetings) are **CLOSED** to the press.

Note: All times listed in Pacific (PST)

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### Breakfast

Time: 7:30am – 9:00am

Room: Gallery I

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Opening Remarks 9:00 - 9:05am

### Executive Perspectives on the Future of Servicing 9:05am – 9:45am

Room: Gallery Ballroom

Virtual: Via Livestream

The one thing in life you can count on is change. What changes will we see in servicing over the next several years? Attend this session to learn what senior industry executives are expecting and what that may mean for your organization.

#### Moderator

- Matt Tully, Senior Vice President, Chief Compliance Officer, Sagent

#### Speakers

- Jason Braxton, Director, Home Mortgage Insurance Division, FHA
- Brandon Latman, Senior Vice President – Head of Default, Mr. Cooper
- Kiran Sahota, Executive Vice President Technology, Freedom Mortgage

## Standardizing State Examination Data with the Mortgage Compliance Dataset

**9:45am – 10:15am**

Room: *Gallery Ballroom*

Virtual: *Via Livestream*

It's time to turn the page and overcome frustrations with loan examination file formats. The MISMO community, in concert with CSBS, has developed the new Mortgage Compliance Dataset to standardize the data and format for state loan examination file submissions. Join this session to learn from CSBS, state regulators, and vendors how this new standard can enable your organization to enhance compliance going forward.

### Speakers

- Kevin Byers, Senior Director, Conference of State Bank Supervisors (CSBS)
- Michael Jackman, Senior Advisor, Asurity
- Sonya McCumber, Senior Vice President Compliance, SitusAMC
- Sheila Oliver, Deputy Commissioner, Escrow and Mortgage Lending Office, State of California

**AM Coffee Break: 10:15am – 10:45am**

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## What is the “Secret Sauce” for Successful AI Implementations?

**10:45am – 11:40am**

Room: *Gallery Ballroom*

Virtual: *Via Livestream*

Artificial Intelligence (AI) continues to be the talk of the town. Let's peel back a layer or two and find out what an AI journey looks like; what are the keys to success; what does quality data have to do with it? Join us to explore these questions and more along with showing a few demonstrations.

## **e-Eligibility: The Key to Unlocking Efficiency and Accelerating Loan Velocity**

**11:40am – 12:00pm**

Room: *Gallery Ballroom*

Virtual: *Via Livestream*

Industry research shows that digitally closed loans improve borrower experience and lender profitability by eliminating errors, automating manual processes, and enabling faster delivery to the secondary market. Join this session to learn how you can harness the power of e-eligibility to achieve digital closings at scale and maximize your organization's profitability.

### **Speakers**

- Jonathan Kearns, Vice President Product, MISMO
- Camelia Martin, Vice President of eMortgage Strategy & Industry Affairs, Snapdocs

**Break 12:00pm - 1:25pm**

## **Newcomer Orientation**

**12:30pm – 1:25pm**

Room: *Salon II*

Virtual: *Via Livestream*

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.

## **GSE Credit Score and Reporting Changes – Industry Implementation Updates**

**1:30pm – 1:50pm**

Room: *Gallery Ballroom*

Virtual: *Via Livestream*

Recent FHFA announcements shed new light on the implementation timeline as well as the timing and availability of historical data specific to the VantageScore 4.0 model. What might this mean for your implementation roadmap? What questions remain? What resources are, or will be, available to help? What should your organization be doing now to prepare? Join this session to find out.

### **Speakers**

- Shawn Jobe, Vice President, Head of Business Development, Credit Interlink, Inc.

## **Making the Mortgage Industry Less Vulnerable to Cyber Attacks**

**1:50pm– 2:35pm**

Room: *Gallery Ballroom*

Virtual: *Via Livestream*

Recent headlines remind us that the mortgage industry is not immune from cyber security threats. Arm yourself with knowledge about what's happening in the industry and how you can make your organization less vulnerable. Learn what MBA is doing in this space including what resources are available and coming soon to support your organization. Listen as industry experts opine on areas where industry standards may be helpful.

### **Panelists**

- J-T Gaietto, Co-founder & Chief Operating Officer, ConvergentDS
- Michael Housch, Chief Revenue Officer & Chief Information Security Officer, Dark Matter Technologies

## Recipe for a Building Your Organization's Data Governance Framework

**2:35pm – 2:55pm**

Room: *Gallery Ballroom*

Virtual: *Via Livestream*

Wondering how your data governance framework compares to industry best practices? Building out a data governance framework for your organization? Attend this session to learn about MISMO data governance resources and how you can use them to enhance data governance and management at your organization.

### Speakers

- Howard Ellison, Data Architect, United Wholesale Mortgage
- Lisa Dorsey, Vice President, Fannie Mae Single Family

**Break 2:55pm - 3:25pm**

## Professionally Speaking: The Path to Becoming a MISMO Certified Consultant

**3:25pm – 3:45pm**

Room: *Gallery Ballroom*

Virtual: *Via Livestream*

MISMO recently announced the first four companies awarded the MISMO Certified Consultant designation. Join this session to learn why MISMO Certified Consultant should be your first call if your company needs consulting support. New CMSPs and AMSPS will be recognized immediately prior to the session.

### Speakers

- Jan Davis, Vice President of Operations, MISMO

## GSE and Housing Agency Updates

**3:45pm – 4:50pm**

Room: *Gallery Ballroom*

Virtual: *Via Livestream*

Tune into this session for an opportunity to hear the latest from GSE, FHA, and VA representatives about their work. Representatives will provide an update and answer questions.

### Speakers

- Colin Deaso, US Department of Veterans Affairs
- Susan Borg, Federal Housing Administration

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### **Evening Reception**

Everyone is invited to join us at MISMO's Tuesday reception. Don't miss this opportunity to network, celebrate MISMO.

Time: 5:00pm – 6:00pm

Room: Outdoor Terrace

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## Wednesday, June 5<sup>th</sup>

*All times Listed in PST*

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### Breakfast

Time: 7:30am – 9:00am

Room: Gallery I

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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*

<b><u>Name</u></b>	<b><u>Room</u></b>	<b><u>Time (PST)</u></b>
<a href="#">Business Glossary CoP</a>	Sculptor	9:00am – 10:20pm
<a href="#">Credit Reporting CoP</a>	Gallery Ballroom II	9:00am – 12:00pm
<a href="#">eMortgage CoP</a>	Gallery Ballroom III	9:00am – 12:00pm
<a href="#">Regulatory Compliance Exam File DWG</a>	Salon I	9:00am – 12:00pm
<a href="#">Decision Modeling CoP</a>	Artisan	9:00am – 12:00pm
<a href="#">Title and Closing CoP</a>	Sculptor	10:40am – 12:00pm
<b>Break</b>	Foyer	12:00pm – 1:30pm
<a href="#">Credit Reporting CoP</a>	Gallery Ballroom II	1:30pm – 2:50pm
<a href="#">eMortgage CoP</a>	Gallery Ballroom III	1:30pm – 2:50pm
<a href="#">Title and Closing Docs to Data DWG</a>	Sculptor	1:30pm – 2:50pm
<b>MISMO Senior Advisors - Invitation Only</b>	Salon II	1:30pm – 4:30pm
<a href="#">Federal Government Housing Agency Servicing Data Standard DWG</a>	Salon I	1:30pm – 4:30pm
<a href="#">Business Process Model CoP</a>	Artisan	1:30pm – 4:30pm

<a href="#">eDoc/eMortgage Vault Interoperability CoP</a>	Gallery Ballroom III	<b>3:10pm – 4:30pm</b>
<a href="#">Origination CoP</a>	Sculptor	<b>3:10pm – 4:30pm</b>
<a href="#">ESG CoP</a>	Gallery Ballroom II	<b>3:10pm – 4:30pm</b>

**Residential Standards Governance Committee *(Invitation Only)***

*Time:* 4:45pm – 6:00pm

*Room:* Salon II

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## Thursday, June 6<sup>th</sup>

All times Listed in PST

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### Breakfast

Time: 7:30am – 9:00am

Room: Gallery I

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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>
<a href="#">eHELOC DWG</a>	Artisan	9:00am – 10:20am
Artificial Intelligence – Continuing the Conversation	Gallery Ballroom III	9:00am – 12:00pm
<a href="#">Architecture WG</a>	Atelier II	9:00am – 12:00pm
<a href="#">Servicing Transfer DWG</a>	Salon I	9:00am – 12:00pm
API, ET, and Blockchain CoPs	Sculptor	9:00am – 12:00pm
<a href="#">Verifiable SMART Docs DWG</a>	Artisan	10:40am – 12:00pm
Break		12:00pm – 1:30pm
<a href="#">Servicing CoP</a>	Salon I	1:30pm – 2:50pm
AVM Working Session ( <b>Invitation Only</b> )	Gallery Ballroom III	1:30pm – 4:30pm
<a href="#">Fee Modernization DWG</a>	Atelier II	1:30pm – 4:30pm
Verifiable Forum	Artisan	1:30pm – 4:30pm

<a href="#">Commercial eNotes DWG</a>	Sculptor	<b>3:10pm – 4:30pm</b>
<a href="#">Secondary CoP</a>	Salon I	<b>3:10pm – 4:30pm</b>

**Council of Chairs Forum Luncheon *(Invitation Only)***

*Time:* 12:00pm – 1:25pm

*Room:* Gallery Ballroom II

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