



MISMO Fall Summit  
Agenda

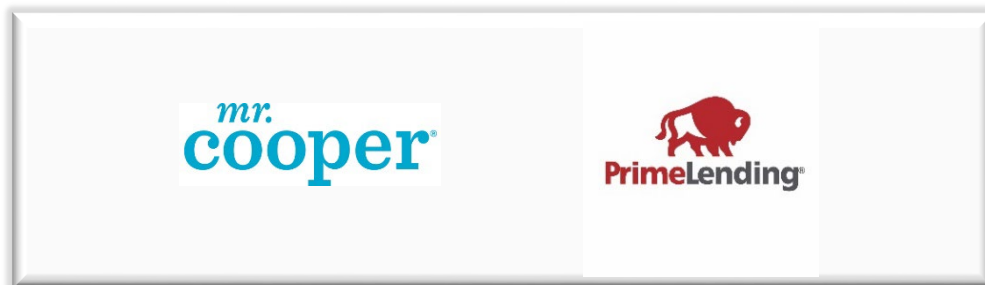
August 26<sup>th</sup> – 29<sup>th</sup>, 2024  
Washington, D.C.

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## Sunday, August 25<sup>th</sup>

*All times Listed in ET*

### **Kick off the Summit with a tour of the [Smithsonian's Air & Space Udvar-Hazy Center!](#)**

Just a 13-minute drive from the Fall Summit location is the Steven F. Udvar-Hazy Center that displays thousands of aviation and space artifacts, including the Space Shuttle Discovery, a Blackbird SR-71, and a Concorde, in two large hangars. Make your way over there on Sunday, Aug. 25th to join fellow attendees for an informal self-guided tour of the facility. We're meeting inside the entrance at 3pm. Hope to see you there!

## Monday, August 26<sup>th</sup>

*All times Listed in ET*

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

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### **Breakfast**

Time: 7:30am – 9:00am

Room: Regency Ballroom & Foyer

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**Opening Remarks 9:00 - 9:05am**

**Executive Perspectives: Appraisal Data Quality Today,  
Tomorrow, and Beyond**

**9:05am – 9:55am**

**Room: Grand Ballroom D-G**

**Virtual: *Via Livestream***

Wondering what is top of mind for GSE executives regarding the appraisal dataset and policy update? Join this session to find out what market benefits they expect and ways you can also benefit.

#### **Moderator**

- Sage Nichols, Head of Client Success, Mortgage Solutions, CoreLogic

#### **Panelists**

- Lisa Dorsey, Vice President Enterprise Data Policy and Governance, Fannie Mae
- Aravind Jagannathan, Vice President Single Family Data Officer, Freddie Mac
- Lyle Radke, Principal Collateral Policy, Fannie Mae
- Scott Reuter, Chief Appraiser and Director of Valuation, Freddie Mac

## AI in Mortgage: Legally Speaking

9:55am – 10:15am

Room: Grand Ballroom D-G

Virtual: *Via Livestream*

Innovations like Generative Artificial Intelligence (GenAI) can bring about galvanizing new business and technology opportunities. But before we get swept up in the excitement, it's important to remember that there are federal, state and local legal legislative and regulatory frameworks to consider. During this session, experts from MBA's Regulatory and State Government Affairs teams will discuss the lay of the land concerning GenAI.

### Speakers

- Gabriel Acosta, Regulatory Specialist, Residential Policy & Strategic Industry Engagement, MBA
- Elizabeth Facemire, Director, State Government Affairs, Residential Policy & Strategic Industry Engagement, MBA

Break 10:15am – 10:45am

## What Does it Mean to Bring GenAI into Your Organization?

10:45am – 11:40am

Room: Grand Ballroom D-G

Virtual: *Via Livestream*

Generative Artificial Intelligence (GenAI) capabilities and potential use cases are growing fast. But how do we take advantage of such cutting-edge innovations while mindfully mitigating risk? Join this panel discussion to learn about what your organization should be considering as it introduces GenAI into its environment.

**Moderator:** Tela Mathias, Managing Partner and Chief Operating Officer, PhoenixTeam

### Speakers

- Steve Holden, PhD, Senior Vice President & Head of Single Family Analytics, Fannie Mae
- Felipe Millon, Public Sector Lead, OpenAI
- Martin Stanley, Emerging Technology Branch Chief, Cybersecurity and Infrastructure Security Agency

**Responsible Innovation in Action - Highlights from  
the FHFA TechSprint** **Room: Grand Ballroom D-G**  
**11:40am – 12:00pm** **Virtual: *Via Livestream***

Earlier this summer, FHFA brought together residential and commercial lenders, vendors, service providers and big tech representatives and challenged them to roll up their sleeves and find some solutions focused on the responsible use of genAI to promote a transparent, fair, equitable, and inclusive housing finance system. Want to get a behind-the-scenes perspective on the innovative use cases and how the teams navigated the risks and controls for using genAI in housing finance? Join this session for those answers, insights, and more!

**Speakers**

- Jan Davis, Vice President Operations, MISMO
- Lawrence Mak, Senior Strategic Analyst Financial Technology and Innovation, FHFA
- Meghan Tidgewell, Principal Consultant, Tidgewell Results eXperience

**Break 12:00pm – 1:30pm**

**Newcomer Orientation** **Room: Grand Ballroom A**  
**12:30pm – 1:25pm** **Virtual: *N/A***

Never been to a MISMO Summit before? Don't worry, we've got you covered! Bring your lunch and attend this session to learn how to get the most out of your Summit experience. And don't miss your chance to be paired with an experienced MISMO Ambassador!

**Speakers**

- David Barkley, CMB, Business Initiatives Director, Freddie Mac
- David Coleman, President, MISMO

Bringing the Power of Data, Transparency, and Speed to  
Financial Markets Today

1:30pm – 2:00pm

Room: Grand Ballroom D-G

Virtual: *Via Livestream*

Common Securitization Solutions (CSS) brings the power of data, transparency, and speed to financials markets supporting the U.S. housing market and global financial markets. How do they do it? Join our Discussion with Lea Laman, SVP, Securitization Operations at CSS learn more about how CSS is leveraging innovation and collaboration to support the financial services industry.

**Speakers**

- Lea Laman, Senior Vice President, Securitization Operations, CSS
- David Coleman, President, MISMO

Weathering the Storm: Data's Role in Disaster  
Recovery

2:00pm – 2:45pm

Room: Grand Ballroom D-G

Virtual: *Via Livestream*

Whether it's major storms, fires, winds, or floods, much of the U.S. has experienced the devastation associated with natural disasters. Effective disaster recovery starts with good data. Join this session to learn how tools and data are being used to assess risk, and, post-disaster, to evaluate impact on a scale we've never seen before. Frontline industry experts will discuss the challenges related to disaster recover that they are navigating and how processes can be enhanced using data innovations.

**Moderator**

- Pete Carroll, Executive Vice President, Public Policy and Industry Relations, CoreLogic

**Panelist:**

- Sacha Rosenthal, Vice President, Single Family Climate Officer, Freddie Mac
- Conrad Ficca, VP of Loan Data Products, ICE Fixed Income and Data Services

Afternoon Coffee Break: 2:45pm – 3:15pm

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**Evaluating Readiness: Next Steps in the Required Credit  
Score Change Process  
3:15pm – 3:45pm**

**Room: Grand Ballroom D-G**  
**Virtual: *Via Livestream***

Given the potential breadth and depth of the impacts of the required credit score changes, a timely, comprehensive overview of the state-of-play is essential. Impacted stakeholders should start now in trying to understand and budget for required system and process changes, examine risks, engage key vendors, and more. A delay in this process could introduce risks and increase costs, which we want to avoid. Join us for a conversation about key outstanding questions and steps being taken to ensure market readiness across the mortgage industry.

**Panel Introduction:**

- Reno D'Water, President, Factual Data

**Moderator**

- Martha-Rosalind "MR" Stainton, Partner, Potomac Point Group

**Panelists**

- Tony Hutchinson, Senior Vice President, Industry & Government Relations, VantageScore
- Sam Oliver, Industry Advisor and Independent Consultant
- Suzanne Garwood, Assistant General Counsel, Chase

**Evolving Mortgage Standards Development and  
Implementation: A Preview of MISMO Link™  
3:45pm – 4:05pm**

**Room: Grand Ballroom D-G**  
**Virtual: *Via Livestream***

Because of its collaborative nature, the standards development process can take time. But the good news is that's all about to change. At this session, you'll receive a preview of the new tool, MISMO Link, that will revolutionize the process of building and implementing standards by enhancing the quality, consistency, and time to market. Don't miss it!

**Speakers**

- Jonathan Kearns, Vice President Product, MISMO

## Mortgage Industry by the Numbers

4:05pm – 4:45pm

Room: Grand Ballroom D-G

Virtual: *Via Livestream*

What are MBA economists saying about the current economic outlook; productivity; technology spending; and how it might impact your organization? Don't miss these valuable insights about current stats related to productivity; technology spending; and importantly--how they might impact your organization. MBA's Vice President of Industry Analysts, Marina Walsh, will lead a discussion about some of the latest data and their potential implications upon the mortgage finance market along with Kara Ward of Falcon Capital Advisors. Tune in!

### Speakers

- Rick Hill, Vice President of Information Technology, MBA
- Marina Walsh, Vice President Industry Analysis, Research and Technology, MBA

**Closing Remarks 4:45 - 4:50pm**

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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: Regency Foyer/Terrace

*Sponsored By:*



# Tuesday, August 27<sup>th</sup>

*All times Listed in ET*


## Breakfast

Time: 7:30am – 9:00am

Room: Regency Ballroom & Foyer

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Coffee Break: 10:20am – 10:40am

Coffee Break: 2:50pm – 3:10pm  
*Sponsored By*  **NotaryLive**

## 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*

<b><u>Name</u></b>	<b><u>Room</u></b>	<b><u>Time (ET)</u></b>
<a href="#">Business Glossary COP</a>	Grand Ballroom F	9:00am – 10:20am
<a href="#">Credit Reporting COP</a>	Grand Ballroom B-C	9:00am – 12:00pm
<a href="#">MI Claim Submission DWG</a>	Regency Ballroom A	9:00am – 12:00pm
<a href="#">Data Governance and Management COP</a>	Lake Anne	9:00am – 12:00pm
<a href="#">Housing Counseling DWG</a>	Grand Ballroom G	9:00am – 12:00pm
<a href="#">Property and Valuation Services COP</a>	Grand Ballroom F	10:40am – 12:00pm
<b>Break</b>		12:00pm – 1:30pm
<a href="#">VA Documents to Data DWG</a>	Grand Ballroom B-C	1:30pm – 2:50pm
<b>AVM DWG</b>	Grand Ballroom F	1:30pm – 4:30pm
<a href="#">Decision Modeling COP</a>	Lake Anne	1:30pm – 4:30pm
<a href="#">eDoc/eMortgage Vault Interoperability COP</a>	Grand Ballroom G	1:30pm – 4:30pm



Lender Forum - <b>Invitation Only</b>	Grand Ballroom E	1:30pm – 4:30pm
<a href="#">Mortgage Insurance COP</a>	Regency Ballroom A	1:30pm – 4:30pm

<p style="text-align: center;"><b>Coffee Talk - Evolving Mortgage Standards Development and Implementation: Demo's and More</b></p> <p style="text-align: center;"><b>8:00am – 8:45am</b></p>	<p style="text-align: center;">Room: Grand Ballroom B-C</p> <hr style="border: 0; border-top: 1px solid white;"/> <p style="text-align: center;">Virtual: <i>Via Zoom</i></p>
<p>Yesterday you heard about MISMO Link™. Join this session for more information and a demo of how the new tool will accelerate the standards development process, make things easier for volunteer contributors, and can be used to facilitate standards implementation within your organization.</p>	

<p style="text-align: center;"><b>MISMO Boot Camp (Session 1)</b></p> <p style="text-align: center;"><b>9:00am – 12:00pm on Tuesday and Wednesday</b></p>	<p style="text-align: center;">Room: Grand Ballroom E</p> <hr style="border: 0; border-top: 1px solid white;"/> <p style="text-align: center;">Virtual: <i>N/A</i></p>
<p>MISMO's Boot Camp Course streamlines the education process for both technical and business professionals to understand how MISMO operates and develops standards, MISMO's Core Components and how to leverage them to meet industry challenges, the components of MISMO's XML reference model how it works and much more! Pass the Boot Camp exam to qualify for your <a href="#">Associate MISMO Standards Professional</a> certification.</p> <p><b><a href="#">Register Here!</a></b></p>	

## GSE and Housing Agency Updates

12:30pm – 1:25pm

Room: Grand Ballroom B-C

Virtual: *Via Zoom*

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

- David Barkley, CMB, Business Initiatives Director, Freddie Mac
- Susan Borg, Deputy Director, U.S. Department of Housing and Urban Development
- Beth Bowser, Product Manager, Fannie Mae
- Dean Daetwyler, PMP, JOATMON, Director System Implementation and Management Division, USDA Rural Housing
- Colin Deaso, Assistant Director, Department of Veteran Affairs
- Mark Friend, Product Analyst, Fannie Mae
- Kasie Lynn, CMSP, PMP, Senior Manager, Freddie Mac

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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: Regency Foyer/Terrace

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## Wednesday, August 28<sup>th</sup>

*All times Listed in ET*

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### Breakfast

Time: 7:30am – 9:00am

Room: Regency Ballroom & Foyer

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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 (ET)</u></b>
<a href="#">Business Process Model COP</a>	Grand Ballroom G	9:00am – 10:20am
<a href="#">Artificial Intelligence (AI) COP</a>	Grand Ballroom B-C	9:00am – 12:00pm
<a href="#">Environmental, Social, and Governance (ESG) COP</a>	Lake Anne	9:00am – 12:00pm
<a href="#">Federal Government Housing Agency Servicing Data DWG</a>	Regency Ballroom A	9:00am – 12:00pm
<a href="#">Title &amp; Closing COP</a>	Grand Ballroom F	9:00am – 12:00pm
<a href="#">Origination COP</a>	Grand Ballroom G	10:40am – 12:00pm
<b>Break</b>		12:00pm – 1:30pm
<a href="#">Title and Closing Docs to Data DWG</a>	Grand Ballroom F	1:30pm – 2:50pm
<a href="#">Blockchain COP</a>	Lake Anne	1:30pm – 4:30pm
<b>Information Management / Architecture Workgroup</b>	Grand Ballroom B-C	1:30pm – 4:30pm
<b>MISMO Senior Advisors - Invitation Only</b>	Grand Ballroom E	1:30am – 4:30pm

<a href="#">Regulatory Compliance Examination File DWG</a>	Regency Ballroom A	1:30pm – 4:30pm
<a href="#">Verifiable Profile SMART Doc DWG</a>	Grand Ballroom G	1:30pm – 4:30pm
<a href="#">Closing Instructions DWG</a>	Grand Ballroom F	3:10pm – 4:30pm

<b>Low Code Solutions to Generate MISMO APIs Using DMN™</b> <b>12:30pm – 1:25pm</b>	<b>Room: Grand Ballroom BC</b> <b>Virtual: <i>Via Zoom</i></b>
<p>Join us with your lunch to discover how MISMO API Specifications, such as the FIPS Code API, can be implemented in minutes using the Decision Model and Notation Standard™ (DMN™). The session is designed for mortgage technologists interested in APIs, low-code, rule-based systems, and decision modeling.</p> <p><b>Speakers</b></p> <ul style="list-style-type: none"> <li>• Simon Ringuette, Team Leader, Trisotech</li> <li>• Brian Stucky, Team Lead, Rocket Ethical AI, Rocket Mortgage</li> </ul>	

<b>Industry Opportunities for Blockchain Technology</b> <b>1:30pm – 2:50pm</b>	<b>Room: <i>Lake Anne</i></b> <b>Virtual: <i>Via Zoom</i></b>
<p>Join this session to learn how blockchain technologies can be used in mortgage to gain efficiencies; explore mortgage industry use cases for blockchain; and how you can get involved through the MISMO Blockchain CoP.</p> <p><b>Speakers</b></p> <ul style="list-style-type: none"> <li>• Devin Caster, Principal, Product Solutions, CoreLogic</li> <li>• Rishi Godse, Principal Technical Architect, USAA</li> <li>• Shawn Jobe, CMSP, Vice President Software and Product Development, Credit Interlink</li> </ul>	

**Closing Instructions Template and Dataset Overview  
and Feedback Session**  
**3:10pm – 4:00pm**

**Room: *Grand Ballroom F***

**Virtual: *Via Zoom***

Lenders, Investors, Software Providers: Your Feedback is Needed. Please join the Closing Instructions DWG on Wednesday, August 28th from 3:10pm ET to 4:00pm ET. The session will feature a short overview of the Closing Instructions Template and corresponding dataset specification along with a request for industry feedback on where it could work for your institution. All input from lenders, mortgage loan investors, and the software companies that support them is welcome! Please join us to add to the wide-ranging discussion about facilitating adoption of the MISMO Closing Instruction templates and data specification.

**MISMO Boot Camp (Session 2)**

**9:00am – 12:00pm**

**Room: *Grand Ballroom E***

**Virtual: *N/A***

MISMO's Boot Camp Course streamlines the education process for both technical and business professionals to understand how MISMO operates and develops standards, MISMO's Core Components and how to leverage them to meet industry challenges, the components of MISMO's XML reference model how it works and much more! Pass the Boot Camp exam to qualify for your [Associate MISMO Standards Professional](#) certification.

[\*Register Here!\*](#)

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

Time: 4:45pm – 6:00pm

Room: Grand Ballroom B-C

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# Thursday, August 29<sup>th</sup>

*All times Listed in ET*

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## Breakfast

Time: 7:30am – 9:00am

Room: Regency Ballroom & Foyer

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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 (ET)</u>
<a href="#">API COP</a>	Lake Anne	9:00am – 10:20am
<a href="#">eMortgage COP</a>	Grand Ballroom B-C	9:00am – 12:00pm
<a href="#">Servicing Transfers DWG</a>	Regency Ballroom A	9:00am – 12:00pm
<a href="#">Title Pricing API DWG</a>	Grand Ballroom F	9:00am – 12:00pm
<a href="#">Emerging Technologies COP</a>	Lake Anne	10:40am – 12:00pm
<b>Break</b>		12:00pm – 1:30pm
<a href="#">eMortgage COP</a>	Grand Ballroom B-C	1:30pm – 2:50pm
<a href="#">Servicing COP</a>	Regency Ballroom A	1:30pm – 2:50pm
<a href="#">Fee Modernization DWG</a>	Grand Ballroom F	1:30pm – 4:30pm
<a href="#">Commercial COP</a>	Lake Anne	1:30pm – 4:30pm
<a href="#">eHELOC DWG</a>	Grand Ballroom B-C	3:10pm – 4:30pm

<a href="#">Secondary COP</a>	Regency Ballroom A	<b>3:10pm – 4:30pm</b>

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

Time: 12:00pm – 1:25pm

Room: Grand Ballroom D

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