



MISMO Spring Summit Agenda

June 3rd – 6th, 2024
San Francisco, California

Thank You to our Sponsors:

Gold Level Sponsors



Bronze Level Sponsors



Monday, June 3rd

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)

Breakfast

Time: 7:30am – 9:00am

Room: Atelier II

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

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

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

Tuesday, June 4th

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)

Breakfast

Time: 7:30am – 9:00am

Room: Gallery I

Sponsored By:  **ncino**

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, Senior Vice President, Customer Service, NewRez
- 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

Sponsored By



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.

Speakers

- Julian Hebron, Founder and Chief Executive Officer, The Basis Point
- Marc Hernandez, Co-Founder & CEO, Aequalend
- Julie Midgely, Managing Director Financial Services Advisory, KPMG
- Leah Price, Financial Technology and Innovation Specialist, FHFA

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

- Lisa Dorsey, Vice President Data Governance, Fannie Mae Single Family
- Howard Ellison, Data Architect, United Wholesale Mortgage
- John “JP” Pomaranski, Director, Actualize Consulting

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

- David Coleman, President, MISMO
- Geran Combs, Managing Director, Actualize Consulting
- Meghan Tidgewell, President, Tidgewell Results Experience

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

- David Barkley, Director, Freddie Mac
- Susan Borg, Deputy Director, Federal Housing Administration
- Colin Deaso, Assistant Director Data and Technology Solutions, US Department of Veterans Affairs
- Colleen Flaxington, Director, Freddie Mac
- Sandra Martz-Griebe, Advisor, Fannie Mae
- Denise Rivoal, Manager, Fannie Mae
- Sunil Vaid, Manager, Freddie Mac

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

Wednesday, June 5th

All times Listed in PST

Breakfast

Time: 7:30am – 9:00am

Room: Gallery I

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

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

eDoc/eMortgage Vault Interoperability CoP	Gallery Ballroom III	3:10pm – 4:30pm
ESG CoP	Gallery Ballroom II	3:10pm – 4:30pm
Origination CoP	Sculptor	3:10pm – 4:30pm

Residential Standards Governance Committee *(Invitation Only)*

Time: 4:45pm – 6:00pm

Room: Salon II

Thursday, June 6th

All times Listed in PST

Breakfast

Time: 7:30am – 9:00am

Room: Gallery I

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

Secondary CoP	Salon I	3:10pm – 4:30pm

Council of Chairs Forum Luncheon *(Invitation Only)*

Time: 12:00pm – 1:25pm

Room: Gallery Ballroom II

Follow us on LinkedIn:

