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## MISMO Spring Summit Agenda

June 9<sup>th</sup> – 12<sup>th</sup>, 2025  
Boston, MA

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## **Sunday, June 8<sup>th</sup>**

*All times Listed in ET*

### MISMITES Tour Boston

**TBD**

Plan to join fellow Summit attendees on Sunday, June 8<sup>th</sup> for a [Boston Duck Tours | Boston's Best Sightseeing Tour](#). Time is TBD.

More information will be posted and shared with all registrants on **May 12<sup>th</sup>** when tickets become available for purchase.

Tour price is \$54.99 and leaves from the New England Aquarium (.7 mile from Summit hotel)

# Monday, June 9<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.

## Breakfast

Time: 7:30am – 9:00am

Room: Nantucket

Sponsored By:  **ncino**

Opening Remarks 9:00 - 9:05am

HOI Perils – The Ripple Effects of an Unstable  
Homeowners Insurance Market  
9:05am – 9:50am

Room: Grand Ballroom

Virtual: *Via Livestream*

Homeowners Insurance (HOI) premiums are skyrocketing, and coverage is shrinking for homeowners in at risk areas. Join this panel to learn more about how volatility in the HOI market is causing ripple effects across the entire mortgage ecosystem and what it means for your organization and clients.

### Panelists

- Andy Davidson, President, Andrew Davidson & Co, Inc
- Harry Gardner, Director of Digital Services, ICE

Break 10:15am – 10:45am

Simplify & Accelerate Adoption of the MISMO Standards  
using AI

10:45am – 11:15am

Room: Grand Ballroom

Virtual: *Via Livestream*

GenAI makes investing in technology easier by simplifying implementation processes. Amazon Web Services has partnered with MISMO to train Amazon's Bedrock LLM on the standards. Join this session to learn about the use cases that have come out of the exercise.

**Prerequisite to AI Adoption: It Starts with the Data**  
**11:15am – 11:35am**

Room: Grand Ballroom

Virtual: *Via Livestream*

Just like when building a home, a strong foundation is key for organizations seeking to adopt artificial intelligence to make their operations more efficient. Join this session to learn how one large lender is using the MISMO Reference Model to lay the strong data foundation needed to support successful future AI adoption.

**Panelists**

- Eric Litwin, Executive Vice President, Production and Capital Markets Technology, Pennymac Financial Services, Inc.

**Lunch Break 12:00pm – 1:30pm**

**Newcomer Orientation**  
**12:30pm – 1:25pm**

Room: Grand Ballroom

Virtual: *Via Livestream*

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!

**Washington Today & Mortgage – Anticipating the Implications of Change**  
**1:30pm – 2:15pm**

Room: Grand Ballroom

Virtual: *Via Livestream*

Administrations come and go, bringing new policies, approaches, and changes that affect our industry. What could changes stemming from the current administration mean for the mortgage industry and your organization? Explore the implications with our panel of industry experts from across the mortgage ecosystem.

**Panelists**

- Justin Wiseman, Vice President, Managing Regulatory Counsel, MBA
- Suzanne Garwood, Managing Director, Associate General Counsel, Chase

## Break 2:45pm – 3:10pm

### Opening the Black Box of State Regulations – A Conversation with a State Regulator

**3:10pm – 3:30pm**

Room: *Grand Ballroom*

Virtual: *Via Livestream*

Everyone is familiar with federal regulators, but the state regulators and their role feel like a black box to many. Join this session to learn about the state regulator's place in the process, what their pain points are and how collaboration with a broader group can ease compliance for lenders.

#### Speakers

- Kevin Byers, Senior Director, Conference of State Bank Supervisors
- Kevin Cuff, Deputy Commissioner - Mortgage Supervision, Massachusetts State Division of Banks

### Expand Your Pipeline While Enhancing Mortgage Quality and Investor Confidence

**3:30pm – 4:00pm**

Room: *Grand Ballroom*

Virtual: *Via Livestream*

In today's market lenders must work harder than ever to connect with potential borrowers. What if it were possible to tap into a pipeline of potential homeowners preparing to be borrowers? When perspective homeowners begin their journey with housing counseling it helps them make informed decisions and reduces default risk. Join this session to learn more about how your organization can take advantage of this excellent opportunity.

#### Panelist

- David Young, NHRC Board Member, National Housing Resource Center

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### Evening Reception

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

Time: 5:00pm – 6:00pm

Room: Ballroom Terrace

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## Tuesday, June 10<sup>th</sup>

All times Listed in ET

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### Breakfast

Time: 7:30am – 9:00am

Room: Nantucket

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Coffee Break: 10:20am – 10:40am

Coffee Break: 2:50pm – 3:10pm

### *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*

<u>Name</u>	<u>Room</u>	<u>Time (ET)</u>
<a href="#">Verifiable Profile SMART Doc DWG</a>	Ballroom A	9:00am – 10:20am
<a href="#">Federal Government Housing Agency Servicing Data DWG</a>	Adrienne Salon	9:00am – 12:00pm
<a href="#">MI Claim Submission DWG</a>	Plymouth	9:00am – 12:00pm
<a href="#">Title &amp; Closing COP</a>	Concord	9:00am – 12:00pm
<a href="#">eHELOC DWG</a>	Ballroom A	10:40am – 12:00pm
<b>Break</b>		12:00pm – 1:30pm
<a href="#">Housing Counseling DWG</a>	Ballroom A	1:30pm – 4:30pm
<a href="#">Mortgage Insurance COP</a>	Plymouth	1:30pm – 4:30pm
<a href="#">Origination COP</a>	Concord	1:30pm – 4:30pm
<a href="#">Regulatory Compliance Examination File DWG</a>	Adrienne Salon	1:30pm – 4:30pm
<b>Lender Forum - Invitation Only</b>	Sturbridge	1:30pm – 4:30pm

<b>MISMO Boot Camp (Session 1)</b> <b>9:00am – 12:00pm on Tuesday and Wednesday</b>		<b>Room: Sturbridge</b> <b>Virtual: N/A</b>
<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><a href="#"><i>Register Here!</i></a></p>		

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### **Evening Reception**

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

Time: 4:45pm – 6:15pm

Room: Ballroom Terrace

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## Wednesday, June 11<sup>th</sup>

*All times Listed in ET*

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### Breakfast

Time: 7:30am – 9:00am

Room: Nantucket

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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="#">Information Management</a>	Plymouth	9:00am – 10:20am
<a href="#">VA Documents to Data DWG</a>	Concord	9:00am – 10:20am
<a href="#">Artificial Intelligence (AI) COP</a>	Ballroom A	9:00am – 12:00pm
<a href="#">Servicing Transfers DWG</a>	Adrienne Salon	9:00am – 12:00pm
<a href="#">Data Governance and Management COP</a>	Plymouth	10:40am – 12:00pm
<a href="#">Fee Modernization DWG</a>	Concord	10:40am – 12:00pm
<b>Break</b>		12:00pm – 1:30pm
<a href="#">Servicing COP</a>	Adrienne Salon	1:30pm – 2:50pm
<a href="#">API COP</a>	Ballroom A	1:30pm – 4:30pm
<a href="#">Blockchain COP</a>	Plymouth	1:30pm – 4:30pm
<a href="#">Business Process Model COP</a>	Concord	1:30pm – 4:30pm
<b>MISMO Senior Advisors – Invitation Only</b>	Sturbridge	1:30pm – 4:30pm
<a href="#">Secondary COP</a>	Adrienne Salon	2:50pm – 4:30pm



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<b>MISMO Boot Camp (Session 2)</b> <b>9:00am – 12:00pm on Tuesday and Wednesday</b>	<b>Room: Sturbridge</b> <b>Virtual: N/A</b>
<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><a href="#"><i><b>Register Here!</b></i></a></p>	

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**Residential Standards Governance Committee (*Invitation Only*)**  
Time: 4:45pm – 6:00pm  
Room: Adrienne Salon

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# Thursday, June 12<sup>th</sup>

*All times Listed in ET*

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## Breakfast

Time: 7:30am – 9:00am

Room: Nantucket

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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*

<b><u>Name</u></b>	<b><u>Room</u></b>	<b><u>Time (ET)</u></b>
<a href="#">Business Glossary COP</a>	Concord	9:00am – 12:00pm
<a href="#">Credit Reporting COP</a>	Adrienne Salon	9:00am – 12:00pm
<a href="#">eMortgage COP</a>	Ballroom A	9:00am – 12:00pm
<a href="#">Environmental, Social, and Governance (ESG) COP</a>	Plymouth	9:00am – 12:00pm
<b>Break</b>		12:00pm – 1:30pm
<a href="#">eMortgage COP</a>	Ballroom A	1:30pm – 2:50pm
<a href="#">Architecture Workgroup</a>	Adrienne Salon	1:30pm – 4:30pm
<a href="#">AVM DWG</a>	Concord	1:30pm – 4:30pm
<a href="#">Decision Modeling COP</a>	Plymouth	1:30pm – 4:30pm
<a href="#">eDoc/eMortgage Vault Interoperability COP</a>	Ballroom A	3:10pm – 4:30pm

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

Time: 12:00pm – 1:30pm

Room: Nantucket

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