



Monday, June 16, 2014

- 6:30 to 7:30pm Welcome Reception and Dinner
Exhibitor Hall and Product Showcase Open
Colorado Ballroom
- 7:30-8:30pm **Keynote Speaker:**
Michael Fratantoni, Senior Vice President of Research and Industry Technology,
Mortgage Bankers Association
- 8:30-9:00pm Wrap Up

Tuesday, June 17, 2014

- 7:45am to 8:30am Continental Breakfast
Colorado Ballroom
- 8:00am to 5:00pm Exhibitor Hall and Product Showcase Open
Colorado Ballroom
- 8:30 to 10:30am **Opening General Session:**
Optimal Blue Product Roadmap
Colorado Ballroom
- Facilitators:**
Bruce Backer, Managing Director, Consumer Direct & Point of Sale Services
Don Brown, Managing Director, Optimal Blue Secondary Services
Tammy Butler, Director, Fair Lending and Compliance, Optimal Blue
Ivan Darius, Co-CEO, Optimal Blue
Kelli Hodges, VP of Operations, Optimal Blue

Larry Huff, Co-CEO, Optimal Blue
Brian Perry, VP of Technology, Optimal Blue
James Rowe, Managing Director, Data and Analytics, Optimal Blue

Who Should Attend:

All Conference Attendees

Summary Description:

With the recent acquisition of LoanSifter, Optimal Blue has greatly expanded its available resources and has already begun to more quickly and comprehensively address the needs of our customers. Please join us for an in-depth presentation describing all of the exciting changes to the expanded Optimal Blue Enterprise Lending Services platform! We will address the roadmap for all of our primary services including Banker, eOriginations, Secondary Marketing, Compliance and Data & Analytics, where you will learn how to use these services to better manage your processes and improve compliance and profitability.

10:30 to 10:45am

Refreshment Break
Colorado Ballroom

10:45am to 12:00pm

Breakout Sessions

Panel Discussion:

All About Servicing: Preparation, Valuation, Retention, Operations & Cash Flow

Executive Presentation Room

Presenter:

Don Brown, Managing Director, Optimal Blue Secondary Services

Panelists:

David Allison, SVP, Dovenmuehle Mortgage

Mark Garland, President, MountainView Servicing Group

Dr. Thomas J. Healy, CMB, Product Manager, Level 1 Loans

Erin Palmer, Managing Director, Mortgage Operations, Talmer Bank & Trust

Seth Sprague, Sr. Vice President, Phoenix Capital

Austin Tilghman, CEO, UCM, Inc.

Who Should Attend:

CEOs, Presidents, COOs, CFOs, Secondary Marketing Managers, Capital Market Managers

Summary Description:

An impressive panel of servicing industry experts will focus on the issues

surrounding retaining the servicing asset. The discussion will cover everything from how to value the asset, subservicing strategies, the retained v. released decision structure, the operational impacts of retaining servicing, the cashflow impacts of retaining servicing, the market for MSR's, and how to hedge the asset. Find out how to optimize your retention strategy and hear from your peers who are retaining servicing rights too!

Peer Group:

Product Eligibility and Pricing

Encompass Select Best Practices

White River I

Facilitators:

DeAn Dawson, Client Services Team Manager, Optimal Blue

Rebecca Roberts, Integration Services Lead, Optimal Blue

Bart Miller, Business Development Manager, Optimal Blue

Who Should Attend:

Lock Desk Users, Business Analysts, Integration Personnel

Summary Description:

Is your company using or evaluating the Optimal Blue Encompass Select integration? Attend this interactive session to gather feedback and solutions from other Encompass Select customers and how exactly they've implemented this integration into their business model. Also, discover how other Encompass customers have solved workflow issues within the integration.

Peer Group:

Compliance Services

Tips, Tricks & Traps of Fair Lending

White River II

Facilitators:

Steven Bakst, Vice President, First Meridian Mortgage

Tammy Butler, Director, Fair Lending & Compliance, Optimal Blue

Valerie Canon, Business Development Manager, Optimal Blue

Maurice Jourdain-Earl, Managing Director, Compliance Tech
David Skanderson, Vice President, Charles River Associates
Michael Thomas, Business Development Manager, Optimal Blue

Who Should Attend:

C-Suite, Compliance, Fair Lending Analysts, Secondary Executives, Operations Managers

Summary Description:

When dealing with new technology, sometimes the uses of the technology become clearer when you hear and see how others are using it. This session will put you right in the middle of other Optimal Blue Advantage users who share their best practices. You'll find out how they save on staff time and money by using the technology to the fullest potential! They will also share how the technology provides a great defensive strategy and compliance management system during exam time. Don't miss this session! Learn more tips, workflow, fair lending analysis and how other lenders use this great tool during an exam to prevent further investigation into their practices.

Skill Building:

Product Eligibility and Pricing

Evaluate and Enforce Your QM Policies with Optimal Blue

Gunnison

Facilitators:

Cheri Brooks, Senior Account Manager, Product Specialist, Optimal Blue
Elaine Figlia, Business Development Manager, Optimal Blue
Kelli Hodges, VP of Operations, Optimal Blue
Sheryl Teague, Product Manager, Optimal Blue

Who Should Attend:

Lock Desk Users, Production Managers, Compliance, Secondary Marketing Managers

Summary Description:

Optimal Blue's QM solutions help companies more efficiently evaluate and enforce QM policies during the initial lock and lock change processes. Get hands-on training on how to create, implement and enforce your company's policies in order to drive profitability and streamline your workflow. Specifically,

learn the best way to create and implement different QM policies based on product and origination channels as well as how to setup the search results to help originators quickly identify that QM policy checks have been met.

Skill Building:

Consumer Direct & Point of Sale

Turn Shoppers into Buyers

Rio Grande

Facilitators:

Bruce Backer, Managing Director, Consumer Direct & Point of Sale Services, Optimal Blue

Joe Puthur, President, Mortgage Coach

Dave Savage, CEO, Mortgage Coach

Dawn Sherbeyn, Product Manager, Optimal Blue

Steve Sullivan, Business Development Manager, Optimal Blue

Who Should Attend:

Presidents, COOs, Loan Production Executives, eCommerce Origination Executives, Marketing Executives

Summary Description:

Today's homebuyer has increasingly moved to digital media in the home-buying process. The Internet, social media, smart phones, and tablets have created an empowered consumer when it comes to the home-buying process. According to the National Association of Realtors, 9 in 10 home buyers today rely on the internet as one of their primary research sources, and 52 percent turn to the web as their first step. Attend this session to understand strategies, tactics and solutions you can implement to convert the home-buying shopper into a homebuyer loan application.

12:00 to 1:30pm

Lunch

Colorado Ballroom

Guest Speaker: Teresa Bazemore, President, Radian Guaranty Inc.

1:45 to 3:00pm

Breakout Sessions

Panel Discussion:

QM & QRM – Reality versus the Myths

Executive Presentation Room

Presenter:

Tammy Butler, Director, Fair Lending & Compliance, Optimal Blue

Panelists:

Jack Curtis, Business Development Manager, Optimal Blue
Mitch Kider, Managing Member, Weiner Brodsky Kider PC
David Skanderson, Vice President, Charles River Associates

Who Should Attend:

C-Suite, Operations Managers, Compliance Executives and Practitioners,
Secondary Marketing Executives and Practitioners

Summary Description:

There is a lot of confusion regarding QM (Qualified Mortgage) and QRM (Qualified Residential Mortgage) and how those two regulations will either complement each other or cause chaos. Industry professionals who are making those decisions and interpreting the regulation will discuss the impact of the decisions and how they will affect your business. Specifically, this panel will cover how QM and QRM may be similar or completely different, important business decisions you may need to make, and how QM and QRM lending will affect your Fair Lending policies.

Peer Group:

Secondary Services

The Power and Perils of Agency Securitization

White River II

Facilitators:

Dan Cooper, SVP, Cornerstone Home Lending, Inc.
Eric Fan, CEO, CFO, Controller Consulting Services, Inc.
Karin Good, SVP of Operations, Optimal Blue Secondary Services
Darryl Reeder, Trading, MBS Securities

Who Should Attend:

Secondary Marketing Managers, Lock Desk Managers, Capital Markets
Managers, CEOs, COOs, CFOs

Summary Description:

Engage in a stirring discussion with industry experts regarding the procedures, possibilities and perils of agency securitization execution. Learn how to prepare to securitize, learn what operational challenges you will face in preparing to

securitize, the benefits to Agency Securitization and the differences between GNMA, FNMA and FHLMA.

Peer Group:

Consumer Direct & Point of Sale

How Well Do You Know Your Consumer?

White River I

Facilitators:

Keith Anderson, VP of Sales, Optimal Blue

Bruce Backer, Managing Director, Consumer Direct & Point of Sales Services, Optimal Blue

Mark Coupland, VP of Business Development, Optimal Blue

Dawn Sherbeyn, Product Manager, Optimal Blue

Who Should Attend:

Presidents, COOs, Loan Production Executives, eCommerce Origination Executives, Marketing Executives

Summary Description:

Don't miss this opportunity to learn from your peers and share your successes and frustrations on identifying and communicating with consumers on things such as lead generation (website widgets, eQuoting, broad set of Investors' rate/eligibility data), marketing tools (emails, rate alerts), cooperative marketing with realtors (open house flyers, website widgets) and compliance (LO Comp, Fair Lending, MI, Fees). Get to know your consumer and learn what works and what doesn't when it comes to loan shopping processes for them. This session will also help you understand the value of being involved earlier in the consumer's loan shopping process with real-time data specific to the consumer.

Skill Building:

Product Eligibility and Pricing

Connect the Dots: Matching Encompass Select to Your Business Model

Rio Grande

Facilitators:

Susan Bean, Business Development Manager, Optimal Blue

DeAn Dawson, Client Services Team Manager, Optimal Blue

Rebecca Roberts, Integration Services Lead, Optimal Blue

Who Should Attend:

Lock Desk Users, Business Analysts, Integration Personnel

Summary Description:

The Optimal Blue Encompass Select Integration has many new bells and whistles. Get hands-on training on how to best implement your company's needs within the integration. In this session, you will learn things like how to process changes after an initial lock, set up product mapping between Optimal Blue and Encompass to modify your field mapping by utilizing the fields to not export administration, how to push the Encompass Product Name and Product Code rather than the Optimal Blue Product Name and Product Code back to Encompass, and much more!

3:00 to 3:15pm

Refreshment Break
Colorado Ballroom

3:15 to 4:30pm

Breakout Sessions:

Panel Discussion:

**Total Quality Loan Origination: Applying Time-Tested Manufacturing
Principals to Extract Efficiencies and Profit**

The Executive Presentation Room

Presenter:

Don Brown, Managing Director, Optimal Blue Secondary Services

Panelists:

Ivan Darius, Co-CEO, Optimal Blue

Beth Milstein, Director of Marketing, Fannie Mae

Frank Poiesz, Managing Director, Newbold Advisors, LLC

Mike Steer, Vice President, Mortgage Quality Management & Research

Who Should Attend:

CEOs, COOs Presidents, CFOs, Secondary Marketing Managers, Capital Market Managers, Lock Desk Managers, COOs

Summary Description:

Listen and participate in a discussion that will explore the benefits of applying

the Total Quality Management Principals to the loan origination process. Understand the benefits of having continuity in data, input controls and check points and intelligent work flow and how these concepts can lead to improved operational efficiency and increased profitability. You will also hear real-world examples of companies that have implemented quality management processes and how it has improved their operations.

Peer Group:

Compliance Services

Tips, Tricks & Traps of Fair Lending

White River II

Facilitator:

Steven Bakst, Vice President, First Meridian Mortgage

Tammy Butler, Director, Fair Lending & Compliance, Optimal Blue

Phil Durban, Business Development Manager, Optimal Blue

Maurice Jourdain-Earl, Managing Director, Compliance Tech

David Skanderson, Vice President, Charles River Associates

Who Should Attend:

C-Suite, Compliance, Fair Lending Analysts, Secondary Executives, Operations Managers

Summary Description:

New technology is great, but sometimes the uses of the technology become clearer when you hear and see how others are using it. This session will put you right in the middle of other Optimal Blue Advantage users who share their best practices. You'll find out how they save on staff time and money by using the technology to the fullest potential! They will also share how the technology provides a great defensive strategy and compliance management system during exam time. Don't miss this session! Learn more tips, workflow, fair lending analysis and how other lenders use this great tool during an exam to prevent further investigation into their practices.

Peer Group:

Product Eligibility and Pricing

Transitioning from LoanSifter

White River I

Facilitators:

Cheri Brooks, Senior Account Manager, Product Specialist, Optimal Blue

Mark Coupland, VP of Business Development, Optimal Blue

Kelli Hodges, VP of Operations, Optimal Blue

Tiffany McGarry, Client Services Team Manager, Optimal Blue

Who Should Attend:

Lock Desk Users, Secondary Marketing, Business Analysts, Integration Personnel

Summary Description:

Talk to other customers who have recently or are currently making a transition from the LoanSifter platform to Optimal Blue. Discuss how these customers resolved road blocks and implemented many new features available in Optimal Blue. In this session, you will learn how to easily implement profit margins by utilizing dynamic markups and markup schedules, create and roll out your own products without any additional costs, and many more Optimal Blue features that are now available to you!

Skill Building:

Secondary Services

Secondary: Managing Exceptions & Errors

Rio Grande

Facilitators:

Megan Arndt, Secondary Analyst, Optimal Blue Secondary Services

Randy Eaton, Senior Secondary Analyst, Optimal Blue Secondary Services

Sean Mackendrick, VP of Development, Optimal Blue Secondary Services

Who Should Attend:

Secondary Marketing Managers, Lock Desk Managers, Capital Markets Managers

Summary:

Work with our experts to discover best practices for understanding and resolving data exceptions in the Optimal Blue Secondary System. Learn how to manage the logical and eligibility exceptions in the Secondary Application and how to eliminate mistakes in pipeline management before they cost you money.

Peer Group:

Secondary Services

Understanding the Efficiencies in Selling Mandatory

Platte

Facilitators:

Mark Coupland, VP of Business Development, Optimal Blue

Jim Glennon, Manager, Account Management & Trading, Optimal Blue

Secondary Services

Jeremy Moreno, Director of Sales & Business, Optimal Blue Secondary Services

Jim Stauss, Business Development Manager, Optimal Blue Secondary Services

Who Should Attend: Companies that currently are selling best efforts, CEOs, COOs, CFOs, Secondary Marketing Managers

Summary:

In this session, you will learn the benefits of selling mandatory, what hedging is and how it works, the risks involved with hedging and the operational benefits of hedging. How do you think about the financial pickup? If you are not sure, this is the session to attend

4:30 to 4:45pm

Refreshment Break

Colorado Ballroom

4:45 to 6:00pm

Breakout Sessions

Panel Discussion:

The Evolving Landscape of the Mortgage Industry

The Executive Presentation Room

Presenter:

Larry Huff, Co-CEO, Optimal Blue

Panelists:

Anthony Bruschi, VP Secondary & Correspondent Sales, Radian Guaranty

Bill Dallas, CEO, Skyline Financial Corp.

Karin Good, SVP of Operations, Optimal Blue Secondary Services

Art Shafer, Mortgage Banker Finance, Comerica Bank

Who Should Attend:

CEOs, CFOs, COOs

Summary Description:

Engage in an open dialogue with industry experts to gain their insight on trends

affecting our industry. In this interactive panel, you will understand the perspective of industry leaders regarding the ever changing landscape of the mortgage industry, hear from a spectrum of technology, capital markets, servicing, mortgage insurance, warehouse and origination executives and have the ability to explore how companies are adjusting their strategies to maximize success.

Peer Group:

Product Eligibility and Pricing

Choosing an LOS

White River II

Facilitators:

Rebecca Roberts, Integration Services Lead, Optimal Blue

Keith Anderson, VP of Sales, Optimal Blue

Who Should Attend:

Lock Desk Users, Secondary Marketing, Integration Specialists, Business Analysts, Production Staff

Summary:

Talk to your peers about evaluations of Loan Origination Systems. What works for them? What have they found in the evaluation process? Learn how other customers have tackled making this choice and discuss road blocks and solutions in making a move to a new LOS.

Peer Group:

Product Eligibility and Pricing

Do More With Less: Historical Pricing & Change Requests

White River I

Facilitators:

Cheri Brooks, Senior Account Manager, Product Specialist, Optimal Blue

Kelli Hodges, VP of Operations, Optimal Blue

Michael Thomas, Business Development Manager, Optimal Blue

Who Should Attend:

Lock Desk Users, Change Management, Production Staff

Summary:

Are you utilizing Optimal Blue Historical Pricing and Change Requests? Don't miss this session where you will be able to discuss how other customers have

implemented these solutions and increased their bottom lines by improving efficiencies in the change process. We will drill into the details on how to use these and the best practices used by current customers.

Peer Group:

Data and Analytics

Insight into Pricing Data Trends in the Lending World

Platte

Facilitator:

Mark Coupland, VP of Business Development, Optimal Blue

Emily Potrykus, Manager, Business Analytics & Strategy, Optimal Blue Secondary Services

James Rowe, Managing Director, Data and Analytics, Optimal Blue

Sheryl Teague, Product Manager, Optimal Blue

Gregg Weeder, Business Development Manager, Optimal Blue

Who Should Attend:

CEOs, CIOs, COOs, Secondary Desk Managers, Risk Managers, Lending Strategy Managers, Data and Pricing Analysts

Summary:

Have questions regarding the Data and Analytics panel? Want to learn more? In this session, participants will have the opportunity to share and discuss best practices on how internal and industry data can be used in decision making. In addition, we'll facilitate a brainstorming session about how Optimal Blue's industry data can be leveraged to improve the customer's ability to manage their business effectively.

Skill Building:

Compliance Services

Protect Your Assets With Optimal Blue Advantage

Rio Grande

Facilitators:

Steven Bakst, Vice President, First Meridian Mortgage

Tammy Butler, Director, Fair Lending & Compliance, Optimal Blue

Phil Durban, Business Development Manager, Optimal Blue

David Skanderson, Vice President, Charles River Associates

Who Should Attend:

C-Suite, Compliance - All Levels, Fair Lending Analysts, Secondary Practitioners, Operations Managers

Summary:

All technology takes a bit of adapting to achieve its fullest potential functionality for your company. Whether you know just the basics or want to learn more about how to expand your usage of Optimal Blue Advantage, this is a must-attend session! Our experts will show you the newest and latest ways to use this tool. You'll learn the basics, along with advanced techniques that have been developed to assist you in your daily workflow and during exam time. You'll also learn about our new patented Fair Lending rate tool that will change the way we all do business. This tool puts you in charge of your data and defends you to the highest degree with your regulators. You do not want to miss this game changer!

6:00 to 6:30pm
6:30 to 10:00pm

Free Time
Dinner, Optimal Performance Awards and "All-Stars" Dinner
Cheyenne Courtyard

Wednesday, June 18

7:45am to 8:30am

Continental Breakfast
Colorado Ballroom

Guest Speaker: Ed Powell, VP, Round Point Mortgage

8:00 am to 2:00pm

Exhibitor Hall and Product Showcase Open
Colorado Ballroom

8:30 to 9:45am

Breakout Sessions

Panel Discussion:

Navigating a Changing Investor Landscape
The Executive Presentation Room

Presenter:

Don Brown, Managing Director, Optimal Blue Secondary Services

Panelists:

Mark Coupland, VP Business Development, Optimal Blue
Michael Lau, CEO, Pingora Asset Management
Jason Moutray, Managing Director, Redwood Trust

Jennifer R. Whip, VP, Fannie Mae
Cindy Smaney, Director of Operations, Freedom Mortgage

Who Should Attend:

CEOs, COOs Presidents, CFOs, Secondary Marketing Managers, Capital Market Managers, Lock Desk Managers, COOs

Summary Description:

Connect and collaborate with a panel of individuals representing the leaders in the mortgage investment community as they discuss current trends, future forecasts and their views on what it takes to maximize your mortgage origination operational revenue. Meet key leaders in the mortgage investor community and better understand the approach that the leading investors are taking with regard to the changing regulatory environment. You will also have the chance to learn about the investor communities business objectives so that you can tailor your strategy to maximize your opportunities and understand the basic concepts of different pricing and transactional approaches to correspondent lending.

Peer Group:

Product Eligibility and Pricing

Maximizing Efforts for Pricing Exceptions

White River I

Facilitators:

Elaine Figlia, Business Development Manager, Optimal Blue
Kelli Hodges, VP of Operations, Optimal Blue
Dawn Sherbeyn, Product Manager, Optimal Blue

Who Should Attend:

Lock Desk Users, Change Management, Production Staff

Summary:

Optimal Blue is currently scoping and rolling out pricing exception features. We would like to gather feedback from the customer base on how their companies handle and enforce pricing exception policies. Customers will have the opportunity to learn what Optimal Blue tools are currently available for handling price exceptions and hear your current views on them. Also, new tools coming with this feature will be announced- don't miss out on this opportunity!

Skill Building:

Secondary Services

Using Shock Analysis & Secondary Trading Tools

Platte

Facilitators:

Tom Wallace, Secondary Analyst, Optimal Blue Secondary Services

Jim Glennon, Manager, Account Management & Trading, Optimal Blue
Secondary Services

Who Should Attend:

Secondary Marketing Managers, Capital Markets Managers, Lock Desk
Managers

Summary Description:

Learn about pipeline analysis tools and techniques from the expert analysts of our Secondary Services team! You will acquire an understanding of the tools accessible to you to quantify your risk position and effectively adjust coverage and explore the various reporting tools available to maximize your understanding of pipeline performance.

Peer Group:

Data and Analytics

Insight into Pricing Data Trends in the Lending World

White River II

Facilitators:

Valerie Canon, Business Development Manager, Optimal Blue

Emily Potrykus, Manager, Business Analytics & Strategy, Optimal Blue Secondary
Services

James Rowe, Managing Director, Data and Analytics, Optimal Blue

Sheryl Teague, Product Manager, Optimal Blue

Who Should Attend:

CEOs, CIOs, COOs, Secondary Desk Managers, Risk Managers, Lending Strategy
Managers, Data and Pricing Analysts

Summary:

Have questions regarding the Data and Analytics panel? Want to learn more? In this session, participants will have the opportunity to share and discuss best practices on how internal and industry data can be used in decision making. In addition, we'll facilitate a brainstorming session about how Optimal Blue's

industry data can be leveraged to improve the customer's ability to manage their business effectively.

Skill Building:

Product Eligibility and Pricing

The Secrets to Banker Configuration

Gunnison

Facilitators:

Cheri Brooks, Senior Account Manager, Product Specialist, Optimal Blue

Kelli Hodges, VP of Operations, Optimal Blue

Who Should Attend:

Lock Desk Users, Secondary Marketing

Summary:

Optimal Blue has many tools to help you change the way in which your products and pricing display to your end user. Join us for a hands-on training to go through the administration tools and get your site looking shiny and new. In this session, you will see different search result styles, learn how to configure forms and colors, and all in all, make your Optimal Blue site unique to your business.

Skill Building:

Compliance Services

Building a Mortgage – Manufacturing Process for Greater Efficiency and Higher Profit Margins

Rio Grande

Facilitators:

Tammy Butler, Director, Fair Lending and Compliance, Optimal Blue

A.R. Smith, President, AR Consulting Partners, LLC

Who Should Attend:

CEOs, CIOs, COOs, Operations

Summary:

The scrutiny of the CFPB and new regulations have forced mortgage lenders to re-evaluate the way that they do business. Increased costs, constricted profits and much lower revenue per loan are causing great concern. Our experts will show you the techniques that other mortgage bankers have used to decrease cost, increase profit and create more revenue per loan.

9:45 to 10:00am

Refreshment Break
Colorado Ballroom

10:00 to 11:15am

Breakout Sessions

Panel Discussion:

Using Big Data to Expand Your Opportunities and Maximize your Business Opportunities

The Executive Presentation Room

Facilitator:

Susan Bean, Business Development Manager, Optimal Blue

Mark Coupland, VP of Business Development, Optimal Blue

Emily Potrykus, Manager, Business Analytics & Strategy, Optimal Blue Secondary Services

James Rowe, Managing Director, Data and Analytics, Optimal Blue

Todd Sherman, President, Motivity Solutions

Sheryl Teague, Product Manager, Optimal Blue

Who Should Attend:

CEOs, CIOs, COOs, Secondary Desk Managers, Risk Managers, Lending Strategy Managers, Data and Pricing Analysts

Summary:

Unlock hidden value in your business with Optimal Blue's data & analytics. As a leading provider of managed content and enterprise lending services, we support one in six new mortgages and connect hundreds of lenders, investors and mortgage insurers. In this session, we will share insights and trends from our comprehensive lending databases. In addition, we will take you on a tour of the information available from our platform and discuss our plans for new solutions to help you grow market share, improve profitability and manage risk.

Peer Group:

Secondary Services

Managing P&L in a Mandatory Environment

White River I

Facilitator:

Henry Chavez, Senior Audit Manager, Spiegel Accountancy Corp.

Karin Good, SVP of Operations, Optimal Blue Secondary Services

Keith May, Partner, Richey, May & Co., LLP

Jeff McCarty, Manager, Operational Analytics, Optimal Blue Secondary Services

Who Should Attend:

CEOs, CFOs, COOs, Secondary Marketing Managers, Capital Market Managers

Summary Description:

Engage with our experts and your peers in a lively discussion regarding measuring and managing your profit and loss in a mandatory environment. Understand the best practices for managing your profit & loss and share experiences with peers about addressing cash flow and profitability challenges. You will also find out how to mine your financials to better understand and improve secondary marketing efficiency.

Skill Building:

Product Eligibility and Pricing

Evaluate and Enforce Your QM Policies with Optimal Blue's QM Solution

Gunnison

Facilitators:

Cheri Brooks, Senior Account Manager, Product Specialist, Optimal Blue

Tiffany McGarry, Client Services Team Manager, Optimal Blue

Bart Miller, Business Development Manager, Optimal Blue

Who Should Attend:

Lock Desk Users, Production Managers, Compliance Staff

Summary:

Optimal Blue's QM solutions help companies more efficiently evaluate and enforce QM policies during the initial lock and lock change processes. Get hands-on training on how to create, implement and enforce your company's policies in order to drive profitability and streamline your workflow. Specifically, learn the best way to create and implement different QM policies based on product and origination channels as well as how to setup the search results to help originators quickly identify that QM policy checks have been met.

Skill Building:

Product Eligibility and Pricing

The Insider's Guide to Historical Pricing and Change Requests

Rio Grande

Facilitators:

DeAn Dawson, Client Services Team Manager, Optimal Blue

Kelli Hodges, VP of Operations, Optimal Blue

Who Should Attend:

Lock Desk Users, Change Management, Production Staff

Summary:

Get hands-on training on how to implement your lock change policies within Optimal Blue. We will help customers set up policies as well as walk through best practices and workflow, and will teach you how to configure change request policies. In this session, you will discover different options and how those are reflected to your end user, and also be able to review workflow for both origination and lock management staff.

Skill Building:

Compliance Services

Building Operational Controls to Increase Profit & Decrease Regulatory Scrutiny

Platte

Facilitator:

Tammy Butler, Director, Fair Lending and Compliance, Optimal Blue

Dawn Sherbeyn, Product Manager, Optimal Blue

Who Should Attend:

CEOs, CIOs, COOs, Operations, Secondary Marketing

Summary:

The CFPB expects tight operational controls that can be revisited and demonstrated during an exam. This new scrutiny is taking many lenders by surprise and they are finding themselves unprepared. This session will help you identify key metrics and how they can be easily monitored, demonstrated and controlled with the use of your pricing engine.

11:15am to 11:30pm Refreshment Break
Colorado Ballroom

11:30am to 12:45pm **Breakout Sessions**

Peer Group:

Secondary Services

Underwriting Workflow Adjustments in a Mandatory Environment

White River I

Facilitators:

Karin Good, SVP of Operations, Optimal Blue Secondary Services

Jim Glennon, Manager, Account Management & Trading, Optimal Blue
Secondary Services

Who Should Attend:

CEOs, COOs, CFOs, Secondary Marketing Managers, Capital Markets Managers

Summary: Delve into the transformational opportunities in your underwriting process as you transition into or accelerate your mandatory commitment strategy. Answer those burning questions in this session such as “How do I approach underwriting in a mandatory environment?” or “What tools are available to assist my underwriting strategy?” and “How do my best execution and underwriting strategies intersect and cooperate?”

Skill Building:

Secondary Services

Secondary Tips Tricks & Best Practices

Platte

Facilitators:

James Annibella, Senior Secondary Analyst, Optimal Blue Secondary Services

Randy Eaton, Senior Secondary Analyst, Optimal Blue Secondary Services

Jeff McCarty, Manager, Operational Analytics, Optimal Blue Secondary Services

Sean Mackendrick, VP of Development, Optimal Blue Secondary Services

Who Should Attend:

Optimal Blue Secondary Services Clients, Secondary Marketing Managers,
Capital Markets Managers, Lock Desk Managers

Summary:

This is a general skill building session designed to provide Optimal Blue Secondary Services clients with an open forum in which to work with our expert analysts to get more in-depth knowledge about how to use the system more effectively. The analytics team will cover the various reporting structures and resources available to you as well as the product roadmap, so you can anticipate the new functionality that will be available to you in the near future. You will also be able to explore opportunities to add features, reporting and other features that would make the system more effective and friendly to the user.

Skill Building:

Compliance Services

Protect Your Assets With Optimal Blue Advantage

Gunnison

Facilitators:

Tammy Butler, Director, Fair Lending & Compliance, Optimal Blue

Dawn Sherbeyn, Product Manager, Optimal Blue

Gregg Weeder, Business Development Manager, Optimal Blue

Who Should Attend:

C-Suite, Compliance-All Levels, Fair Lending Analysts, Secondary Practitioners, Operations Managers

Summary:

All technology takes a bit of adapting to achieve its fullest potential functionality for your company. Whether you know just the basics or want to learn more about how to expand your usage of Optimal Blue Advantage, this is a must-attend session! Our experts will show you the newest and latest ways to use this tool. You'll learn the basics, along with advanced techniques that have been developed to assist you in your daily workflow and during exam time. You'll also learn about our new patented Fair Lending rate tool that will change the way we all do business. This tool puts you in charge of your data and defends you to the highest degree with your regulators. You do not want to miss this game changer!

Skill Building:

Product Eligibility and Pricing

The Insider's Guide to Historical Pricing and Change Requests

Rio Grande

Facilitators:

Cheri Brooks, Senior Account Manager, Product Specialist, Optimal Blue
Kelli Hodges, VP of Operations, Optimal Blue
Steve Sullivan, Business Development Manager, Optimal Blue
Sheryl Teague, Product Manager, Optimal Blue

Who Should Attend:

Lock Desk Users, Change Management, Production Staff

Summary:

Get hands-on training on how to implement your lock change policies within Optimal Blue. We will help customers set up policies as well as walk through best practices and workflow and will teach you how to configure change request policies. In this session, you will discover different options and how those are reflected to your end user and also be able to review workflow for both origination and lock management staff.

1:00pm

Departures

Session Types and Tracks

SKILL BUILDING WORKSHOPS

Designed to help customers use our systems and services more effectively.

PEER TO PEER DISCUSSIONS

Designed to engage customers in facilitated discussions on specific subjects so they can share user experiences, techniques and opportunities

INDUSTRY KNOWLEDGE DISCUSSIONS

Designed to expose our clients to industry experts, trends, strategies and developments in an interactive and instructive environment.

NOTE: Sessions and presenters are scheduled as shown but subject to change without notice.

