

## Session Descriptions for 2014 Client Conference

### **Opening General Session:**

*Optimal Blue Product Roadmap*

### **Facilitators:**

Ivan Darius, co-CEO, Optimal Blue

Larry Huff, co-CEO, Optimal Blue

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

Don Brown, President, Optimal Blue Secondary Services

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

Kelli Hodges, VP of Operations, 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.

### **Panel Discussion:**

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

### **Presenter:**

Don Brown, President, Optimal Blue Secondary Services

### **Panelists:**

David Allison, SVP, Dovenmuehle Mortgage

Tom Healy, Product Manager, Level 1 Loans

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

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

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, and the market for MSRs, 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*****Facilitator:**

Rebecca Roberts, Integration Services Lead, Optimal Blue

**Participants:**

DeAn Dawson, Senior Account Manager, 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*****Facilitator:**

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

**Participants:**

Maurice Jourdain-Earl, Managing Director, Compliance Tech

Valerie Canon, Business Development Manager, Optimal Blue

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's QM Solution***

**Facilitator:**

Sheryl Teague, Product Manager, Optimal Blue

**Participants:**

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

Kelli Hodges, VP of Operations, Optimal Blue

Elaine Figlia, Business Development Manager, Optimal Blue

**Who Should Attend:**

Lock Desk Users, Production Managers, Compliance Staff

**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***

**Facilitator:**

Dawn Sherbeyn, Product Manager, Optimal Blue

**Participant:**

Bruce Backer, Managing Director, Consumer Direct & Point of Sale Services, Optimal Blue  
Steve Sullivan, Business Development Manager, Optimal Blue

**Who Should Attend:**

President, COO, Loan Production Executives, eCommerce Origination Executives, Marketing Executives

**Summary Description:**

Today's home buyer has increasingly moved to digital mediums 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 home buyer loan application.

**Panel Discussion:**

*QM & QRM – Reality versus the Myths*

**Presenter:**

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

**Panelists:**

Mitch Kider, Managing Member, Weiner Brodsky, Kider PC  
Dave Skanderson, Principal, Charles River Associates  
Jack Curtis, Business Development Manager, Optimal Blue

**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***

**Facilitator:**

Karin Good, Optimal Blue Secondary Services

**Participants:**

Dan Cooper, SVP, Cornerstone Home Lending, Inc.

Eric Fan, CEO, CFO, Controller Consulting Services, Inc.

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 how the differences between GNMA, FNMA and FHLMA.

**Peer Group:**

Consumer Direct & Point of Sale

*How Well Do You Know Your Consumer?*

**Facilitator:**

Dawn Sherbeyn, Product Manager, Optimal Blue

**Participant:**

Keith Anderson, VP of Sales, Optimal Blue

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

**Who Should Attend:**

President, COO, 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*****Facilitator:**

Rebecca Roberts, Integration Services Lead, Optimal Blue

**Participant:**

DeAn Dawson, Senior Account Manager, Optimal Blue

Susan Bean, Business Development Manager, 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 things like how to process changes after an initial lock, setup 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!

**Skill Building:**

Secondary Services

***Successfully Managing Exceptions & Errors*****Facilitator:**

James Annibella, Analyst, Optimal Blue Secondary Services

**Participant:**

Megan Arndt, Analyst, Optimal Blue Secondary Services

**Who Should Attend:**

Secondary Marketing Managers, Lock Desk Managers, Capital Markets Managers

**Summary Description:**

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 as well as how to eliminate mistakes in pipeline management before they cost you money. You don't want to miss it!

**Panel Discussion:**

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

**Presenters:**

Don Brown, President, Optimal Blue Secondary Services

Ivan Darius, co-CEO, Optimal Blue

**Name of Panelist:**

Beth Milstein, Director of Marketing, Fannie Mae

**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*

**Facilitator:**

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

**Participants:**

Maurice Jourdain-Earl, Managing Director, Compliance Tech

Phil Durban, Business Development Manager, Optimal Blue

**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***

**Facilitator:**

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

**Participants:**

Tiffany McGarry, Client Services Team Manager, Optimal Blue

Kelli Hodges, VP of Operations, Optimal Blue

Nicolle Nelson, Business Development 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 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

***Using Shock Analysis & Secondary Trading Tools***

**Facilitator:**

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

**Participants:**

Megan Arndt, Analyst, 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 our expert analysts from our Secondary Services team where you will understand the tools available 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.

**Skill Building:**

Consumer Direct & Point of Sale

***Integrating Your Service Channels***

**Facilitator:**

Dawn Sherbeyn, Product Manager, Optimal Blue

**Participants:**

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

Jack Curtis, Business Development Manager, Optimal Blue

**Who Should Attend:**

President, COO, Loan Production Executives, eCommerce Origination Executives, Marketing Executives

**Summary Description:**

Regardless of the potential home buyers original touch point with your organization, consumers expect their interaction with a mortgage lender to be uncomplicated, relevant, seamless and consistent.

Attend this session to understand strategies, tactics and solutions to deliver consistent content across your lead generation. Extend your reach through multiple, integrated lead generation solutions, integrate your lead generation solutions with consistent content and connect the lead generation solutions for seamless information delivery!

**Panel Discussion:**

*The Evolving Landscape of the Mortgage Industry*

**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 Operations

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:**

Secondary Services

***Understanding the Efficiencies in Selling Mandatory***

**Facilitators:**

Shaun McCarthy, Business Development Manager, Optimal Blue Secondary Services

Jim Stauss, Business Development Manager, Optimal Blue Secondary Services

**Participant:**

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

Jeremy Moreno, Director of Sales & Business, 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 to 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.

**Peer Group:**

Product Eligibility and Pricing

***Do More With Less: Historical Pricing & Change Requests***

**Facilitator:**

Kelli Hodges, VP of Operations, Optimal Blue

**Participant:**

Cheri Brooks, Senior Account Manager, Product Specialist, 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 line by increasing efficiencies in the change process. We will drill into the details on how to use these and the best practices used by current customers.

**Skill Building:**

Secondary Services

***Secondary Tips Tricks & Best Practices*****Facilitator:**

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

**Participants:**

Tom Wallace, Analyst, Optimal Blue Secondary Services

James Annibella, Analyst, 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 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*****Facilitator:**

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

**Participant:**

Phil Durban, Business Development Manager, Optimal Blue

**Who Should Attend:**

C-Suite, Compliance-All Levels, Fair Lending Analysts, Secondary practitioners, Operation Managers

**Summary:**

All technology takes a bit of adapting to get it working for your company to its fullest potential. 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!

**Panel Discussion:**

*Navigating a Changing Investor Landscape*

**Speaker:**

Don Brown, President, Optimal Blue Secondary Services

**Panelist:**

Mark Coupland, VP Business Development, Optimal Blue

Jennifer Roe Whip, VP, Fannie Mae

**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 view 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***

**Facilitator:**

Dawn Sherbeyn, Product Manager, Optimal Blue

**Participants:**

Kelli Hodges, VP of Operations, Optimal Blue, Elaine Figlia, Business Development 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!

**Peer Group:**

Data and Analytics

***Insight into Pricing Data Trends in the Lending World***

**Facilitator:**

Sheryl Teague, Product Manager, Optimal Blue

**Participant:**

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

Valerie Canon, Business Development Manager, Optimal Blue

**Who Should Attend:**

CEO's, CIO's, COO's, 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:**

Secondary Services

***Secondary: Managing Exceptions & Errors***

**Facilitator:**

James Annibella, Analyst, Optimal Blue Secondary Services

**Participant:**

Ashlee Davis, Analyst, 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.

**Skill Building:**

Product Eligibility and Pricing

***The Secrets to Banker Configuration***

**Facilitator:**

Kelli Hodges, VP of Operations, Optimal Blue

**Participant:**

Sheryl Teague, Product Manager, Optimal Blue

Cheri Brooks, Senior Account Manager, Product Specialist, 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.

**Panel Discussion:**

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

**Facilitator:**

Sheryl Teague, Product Manager, Optimal Blue

**Participant:**

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

Susan Bean, Business Development Manager, Optimal Blue

**Who Should Attend:**

CEO's, CIO's, COO's, 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***

**Facilitator:**

Karin Good, SVP of Operations, Optimal Blue Secondary Services

**Participants:**

Henry Chavez, Senior Audit Manager, Spiegel Accountancy Corp

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

Keegan Zimmerman, Analyst, 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

**Peer Group:**

Product Eligibility and Pricing

***Choosing an LOS***

**Facilitator:**

Rebecca Roberts, Integration Services Lead, Optimal Blue

**Participant:**

Paul Segraves, Account Manager, Optimal Blue

Keith Anderson, VP of Sales, Optimal Blue

**Who Should Attend:**

Lock Desk Users, Secondary Marketing, Integration Specialist, Business Analyst, 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.

**Skill Building:**

Product Eligibility and Pricing

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

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

**Participant:**

Tiffany McGarry, Client Services Team Manager, Optimal Blue

Bart Miller, Business Development Manger, 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*****Facilitator:**

Kelli Hodges, VP of Operations, Optimal Blue

**Participant:**

DeAn Dawson, Senior Account Manager, Optimal Blue

Nicolle Nelson, Business Development 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 setup 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.

**Peer Group:**

Secondary Services

***Underwriting Workflow Adjustments in a Mandatory Environment***

**Facilitator:**

Don Brown, President, 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?”

**Peer Group:**

Data and Analytics

***Insight into Pricing Data Trends in the Lending World***

**Facilitator:**

Sheryl Teague, Product Manager, Optimal Blue

**Participant:**

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

Gregg Weeder, Business Development Manager, Optimal Blue

**Who Should Attend:**

CEO's, CIO's, COO's, 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*****Facilitator:**

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

**Participants:**

Gregg Weeder, Business Development Manger, Optimal Blue

**Who Should Attend:**

C-Suite, Compliance-All Levels, Fair Lending Analysts, Secondary practitioners, Operation Managers

**Summary:**

All technology takes a bit of adapting to get it working for your company to its fullest potential. 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*****Facilitator:**

Kelli Hodges, VP of Operations, Optimal Blue

**Participant:**

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

Steve Sullivan, Business Development 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 setup 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.

