



# NATIONAL SETTLEMENT SERVICES SUMMIT (NS3)

@TheSummit\_NS3 | #NS32023

## Tuesday, June 6

10 am - 6:00 pm

### Registration Open

12:00 - 6:00 pm

Grand Ballroom A-D  
4th Floor

### Exhibitor Floor & Networking Pub Open

Sponsored by



1:00 - 1:25 pm

### Opening Ceremony

1:25 - 2:10 pm

Grand Ballroom FGH  
4th Floor

### Keynote Address | A Harrowing Journey to Success

Long Doan has faced a great deal of adversity on his way to success – from his escape from Vietnam, surviving Hell Island and building businesses, to failing in the 2008 financial crisis and building again. He will share his journey to becoming a pillar in the real estate industry. As owner of a real estate brokerage and RG Title, he has earned many recognitions for his achievements. Join him as he shares his strategies for overcoming obstacles and walk away empowered to take control of your own circumstances and thrive.

**Long Doan**, CEO, Realty Group

2:10 - 3:00 pm

### Opportunities in HELOCs

In this challenging market, many homeowners are taking advantage of Home Equity Lines of Credit. Learn how to streamline your processes and work with your industry partners to respond to your consumer's needs.

**Nathan Bossers**, President, Boston National Title

**Sam Verma**, CEO, PrivoCorp

3 - 3:20 pm

### Networking Break with Exhibitors

Sponsored by



3:20 - 4:10 pm

### RESPA and Digital Marketing Compliance

With the increased oversight of digital marketing and lead generation, the industry needs to know how to comply.

**Loretta Salzano**, President, Franzén & Salzano

**Jerra Ryan**, Vice President, Firstline Compliance, LLC

4:10 - 5:00 pm

## Lender Panel: A Collaboration

What are the top priorities of today's mortgage lenders? Learn how to be their go-to partner in the real estate transaction.

**Beth Fowler**, *Executive Vice President, Stewart Lender Services*

**Adam Neft**, *Branch Manager, Go Mortgage*

**Kate Steineman**, *Senior Vice President, Business Execution Senior Manager, Wells Fargo Home Lending*

4:50 pm

## Make A Child Smile Community Outreach Event

4th floor foyer

Sponsored by



5:00 - 6:00 pm

Grand Ballroom A-D

4th Floor

## Opening Night Reception

Exhibitor Floor

Sponsored by



9:00 pm - 12 am

## Networking Nightcap

Gateway East & Terrace, 18th Floor

Sponsored by



## Tech Demos

Park View, 4th Floor

12:00 - 4:30 pm

- 12:00 pm **AtClose**
- 12:15 pm **Mobility Market Intelligence (MMI)**
- 12:30 pm **SoftPro**
- 2:15 pm **Pippin Title**
- 2:30 pm **ICE Mortgage Technology**
- 2:45 pm **CloseClear**
- 3:30 pm **Closinglock**
- 3:45 pm **Qualia**
- 4:00 pm **Kloud9 IT**

\*All times Central Time. Times and events are subject to change.

# Wednesday, June 7

7:45 am - 5:00 pm

## Registration Open

7:45 am - 5:00 pm

Grand Ballroom A-D  
4th Floor

## Exhibitor Floor & Networking Pub Open



7:45 - 8:30 am

## Networking Breakfast with Exhibitors



8:30 - 8:45 am

Grand Ballroom FGH  
4th Floor

## Opening Ceremony

8:45 - 9:45 am

Grand Ballroom FGH  
4th Floor

## Keynote Address | Creating a Different and Better Tomorrow Together!



This engaging and energetic keynote address will shine a light on how to deliberately create ideas both individually and collectively that will empower you to reframe, improve, and execute novel solutions as you evolve and prepare for change. You will walk away with new ideas and strategies to lean into collaborative innovation, which is key to successfully capitalizing on the relentless pace and range of change in the industry.

**Ed Molitor**, *CEO & Founder*, The Molitor Group | Host of the Athletics of Business

9:45 - 10:05 am

Grand Ballroom FGH  
4th Floor

## October Research Awards and Make A Child Smile Presentation

10:10 - 11:00 am

**Concurrent**

Grand Ballroom FGH  
4th Floor

## **NEW** Innovation Track | 5 New Tools to Enhance Your Business

Innovative leaders will share tools that helped them grow their business and how they could work for you.



**Alex Brown**, *Director of Title Strategy*, Qualia

**Jim Campbell**, *CEO*, Title Alliance

**Alan Frelix**, *Founder and CEO*, The Closing Exchange

**Shawna Hernandez**, *Chief Operating Officer*, Endpoint

**Jaime Kosofsky**, *Executive Vice President, Business Development and Compliance, Founding Partner*, Brady & Kosofsky

10:10 - 11:00 am

**Concurrent**

Park View, 4th Floor

## Compliance Track | State of States: A Regulator Panel

Hear directly from state regulators on trends around the country, their priorities for 2023/24 and how you should prepare your business.

**Kim Holbrook**, *Chair*, Utah Title and Escrow Commission, *Vice President*, Old Republic Title

**Pratima Lele**, *Market Compliance Examinations Manager*, Government of the District of Columbia Department of Insurance, Securities and Banking

**Chuck Myers**, *Deputy Commissioner*, Office of Property & Casualty, Louisiana Department of Insurance

**Marjorie Thompson**, *Chief of Investigations*, Missouri Department of Commerce & Insurance

10:10 - 11:00 am

**Concurrent**

Regency Ballroom B

2nd Floor

## Collaborative Workshop | Creating Powerful Branding: a SurTHRIVAL Guide

Join MyHome, a WFG Company's Vice President of Strategic Growth, Sam Trimble as he leads a fun, insightful and hands-on session! This fast paced session will help you create a strategy for identifying a true brand vision and reveal simple yet powerful tactics to position your brand in a way that will help you not just survive but **surTHRIVE** in this or in **any** market! He promises to leave you with several simple, actionable takeaways that you will be able to implement into your business immediately!

**Sam Trimble**, *Vice President of Strategic Growth*, MyHome, a Williston Financial Group Co.

10:10 - 11:00 am

**Concurrent**

Regency Ballroom A

2nd Floor

## Collaborative Workshop | 1031 Compliance and Opportunities

Dispel erroneous beliefs and myths around 1031 exchanges. What are the requirements for a valid exchange today? Address the pain points and learn how to resolve them.

**John T. Banjak, Esq.**, *Principal & General Counsel*, True Title Company, LLC

**David Gorenberg**, *Managing Director*, Accruit, LLC

11:00 - 11:30 am

## Networking Break with Exhibitors



11:30 - 12:20 pm

**Concurrent**

Grand Ballroom FGH

4th Floor

## Innovation Track | Use and Implementation of Real-Time Payments (RTPs)

There is a lot of confusion around Real Time Payments and how they are used in the real estate transaction. They will discuss regulations, good funds, communication between lenders and title agents and much more. Get your questions answered and eliminate confusion around this new technology.

**Richard Booth**, *Senior Product Manager and Vice President*, KeyBank

**Cheryl Gurz**, *Product Manager Real Time Payments*, The Clearing House

11:30 - 12:20 pm

**Concurrent**

Park View, 4th Floor

## Compliance Track | Navigating Data Privacy Laws

The latest consumer protection efforts revolve around consumer data. More and more states are regulating how this information is stored and shared. Learn what's required and how to comply.

**Ryan Cabrita**, *Chief Information Security Officer*, Gulotta Grabiner Law Group, LLC  
**Greg Szweczyk**, *Partner*, Ballard Spahr

11:30 - 12:20 pm

**Concurrent**

Regency Ballroom B

2nd Floor

## Collaborative Workshop | Growing into New Markets and Lines of Business

Attend this collaborative workshop to learn how to find new opportunities by entering new markets and offering new lines of business.

**Andrea Somers**, *Operations Manager*, Florida Agency Network

11:30 - 12:20 pm

**Concurrent**

Regency Ballroom A

2nd Floor

## Collaborative Workshop | Implementing a Mentorship Program

A mentor may help you in your own career, but can they help your business as well? Join this workshop and discuss how to start a mentoring program, potential pitfalls, and how to retain talent and prepare for the future.

**Leslie Wyatt**, *Director of Regulatory Compliance*, SoftPro

12:20 - 1:35 pm

## Networking Lunch

Sponsored by

**Invicto** PremiumTitle<sup>SM</sup>  
AN ALTISOURCE<sup>SM</sup> BUSINESS UNIT

1:35 - 2:30 pm

**Concurrent**

Grand Ballroom FGH

4th Floor

## NEW Innovation Track | Artificial Intelligence Breakdown

Top innovators will share what AI is, how AI is being used and its benefits and challenges.



**Ken Julian**, *Vice President*, Orange Coast Lender Services

**Hoyt Mann**, *President & Co-founder*, Alanna.ai

**Bill Svoboda**, *Co-founder*, CloseSimple

**Matt Younkle**, *Co-founder & CEO*, Pythonic Corporation

1:35 - 2:30 pm

**Concurrent**

Park View, 4th Floor

## Compliance Track | New MISMO Products Ready For You

MISMO is debuting new initiatives that will make a difference in the working relationship between and among mortgage professionals. A representative of the Title and Closing Community of Practice will go over closing instructions, fee naming and docs to data.

**Ruth Dillingham NTP**, *Owner*, Dillingham Consulting, LLC

1:35 - 2:30 pm

**Concurrent**

Regency Ballroom B

2nd Floor

## Collaborative Workshop | Customizing Strategies in Human Resources

Join this expert-led interactive workshop on how to implement new strategies in human resources such as remote hybrid work, smart hiring, onboarding and retaining employees and how to connect operations and sales.

**Kathy Kwak**, *Chief Operating Officer*, Proper Title

2:40 - 3:30 pm

**Concurrent**

Grand Ballroom FGH

4th Floor

## Innovation Track | Avoiding Mortgage Payoff Fraud

This type of fraud is a growing concern and the industry needs innovative ways to prevent these attacks as well as a plan how to respond if they get through. Get the takeaways you need to prepare your team.

**Carole Bullion-Mincy**, *Business Development Specialist*, Liberty Title Agency

**Sejal Lakhani-Bhatt**, *CEO*, Techwerxe

2:40 - 3:30 pm

**Concurrent**

Park View, 4th Floor

## NEW Technology Forum

### Technology Differentiators

- Artificial Intelligence (AI)
- Cyber / Fraud

Join a guided discussion to look inward and outward when it comes to technology. What are your technology differentiators and how do you effectively communicate them to your business partners and clients? Attend one or both sessions and come prepared to share best practices and the challenges you've faced along the way, so we can help move the real estate transaction forward.

**Rick Diamond**, *Vice President, Agency I.T. Director*, Fidelity National Financial

**Erica Meyer**, *CEO & Publisher*, October Research, LLC

2:40 - 3:30 pm

**Concurrent**

Regency Ballroom B

2nd Floor

## Collaborative Workshop | Reputation Management workshop

Customer reviews are a constant conversation for title agents. This workshop will dive into cost-effective ways to get more 5-star reviews and how to react when you get a bad review. We'll give you some crowd-sourced ideas for growing your customer reviews to use in the office immediately.

**Wayne Stanley**, *Owner*, Bowe Digital

3:30 - 4:00 pm

## Networking Break with Exhibitors



4:00 - 5:00 pm

**Concurrent**

Grand Ballroom FGH

4th Floor

## Underwriter Leadership Discussion

The top underwriters respond to the market and industry trends.

**Jeff Bluhm**, *Executive Vice President*, Old Republic National Title Insurance Co.

**Rich Cannan**, *Executive Vice President*, Fidelity National Financial

**Scott Gillen**, *Senior Vice President, National Agents*, Stewart Title Guaranty

**Don Kennedy**, *Managing Director, North Region*, First American Agency Division

4:00 - 5:00 pm

**Concurrent**

Park View, 4th Floor

## NEW Technology Forum

### Communicating Effectively

- AI as a Communications Tool
- Changing the Culture of Communications

Join a guided discussion to look inward and outward when it comes to technology. What are your technology differentiators and how do you effectively communicate them to your business partners and clients? Attend one or both sessions and come prepared to share best practices and the challenges you've faced along the way, so we can help move the real estate transaction forward.

**Rick Diamond**, *Vice President, Agency I.T. Director*, Fidelity National Financial  
**Erica Meyer**, *CEO & Publisher*, October Research, LLC

5:15 - 8:45 pm

### Transportation to/from Networking Reception



5:30 - 7:30 pm

### Networking Reception

Sports & Social at Ballpark Village – Transportation to be provided



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## Thursday, June 8

7:45 am - 12 pm

### Registration Open

8:00 - 8:50 am

**Park View, 4th Floor**

### Women in Business Breakfast

*space is limited*

**Linda Grahovec**, *SVP, National Agency Director of Communications, Education, Marketing*, FNF Family of Companies

**Erica Meyer**, *CEO & Publisher*, October Research, LLC

**Leslie Wyatt**, *Director of Regulatory Compliance*, SoftPro



8:15 am - 12 pm

**Grand Ballroom A-D  
4th Floor**

### Exhibitor Floor & Networking Pub Open



8:15 - 9:00 am

### Networking Breakfast with Exhibitors



9:00 - 9:15 am  
Grand Ballroom FGH  
4th Floor

## Opening Ceremony

9:15 - 10:00 am

## Progress and Opportunities for Future Transactions

While the industry has made great strides in recent years, there are still opportunities ahead. Learn how to take advantage of these opportunities and set your business up for success.

**Patrick Stone**, *Chairman and Founder*, Williston Financial Group

10:00 - 10:20 am

## Networking Break with Exhibitors



10:20 - 11:10 am

## Attorney Opinion Letters: A Candid Discussion

It's been over a year since Fannie amended their selling guide to allow the purchase of loans using AOLs. What has happened since then, what concerns and considerations should issuing attorneys and participating lenders consider and what is the future of AOLs as an alternative to title insurance?

**Chuck Cain**, *Senior Vice President*, FNF Family of Companies  
**Brian Levy**, *Of Counsel*, Katten and Temple

11:10 am - 12 pm

## The CFPB Unveiled: What's New, What's Hot, and What's Not

Overreach by the CFPB isn't a foregone conclusion that we simply have to endure. We have the attorney who devised the winning legal arguments in the Townstone case here for a candid conversation; designed to help you think about strategy and tactics when dealing with the bureau. You won't want to miss this wide-ranging overview of what the CFPB is focused on, what to watch in enforcement actions and in the courts, and how to tool up your shop to prepare for what's coming out of D.C. We'll discuss recent CFPB proposed and final rules, the future Supreme Court case on the CFPB's Appropriations, and more. Be sure to bring your questions about the future of the CFPB and impacts to our industry.

**Richard Horn**, *co-Managing Partner*, Garriss Horn  
**Mary Schuster**, *Senior Vice President - Industry Relations*, RamQuest

Noon

## NS3 Concludes

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