

# MAIN SESSIONS

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## MONDAY, SEPTEMBER 22

**1:00 PM - 1:15 PM**

### **OPENING WITH CARL WOOLOFF**

Kick off LVIC25 with Loan Vision CRO Carl Wooloff as he welcomes attendees and sets the stage for three days of learning, networking, and innovation.

**1:15 PM - 2:00 PM**

### **OPENING KEYNOTE WITH PAUL LOFTUS**

Loan Vision CEO Paul Loftus will kick off LVIC25 by taking you on a journey of company transformation to better align with mortgage industry needs and the leading innovation role that Loan Vision will play in the changing landscape. He will share Loan Vision's AI strategy and the tech roadmap shaping the future of the platform, designed to help customers maintain profitability even in challenging times.

**2:00 PM - 3:00 PM**

### **LEGACY THINKING, MODERN PROBLEMS: 5 FIXES FOR A BETTER MORTGAGE BUSINESS WITH GARTH GRAHAM**

Join STRATMOR's Garth Graham as he explores how legacy thinking continues to hold back mortgage lending today. Discover five key shifts mortgage leaders must make to innovate, reduce costs, and drive sustainable growth in a rapidly changing market.

**3:15 PM - 4:00 PM**

### **LV INNOVATIONS: THE NEXT GENERATION + HEADLINE SPONSOR**

Join Loan Vision to explore how our modular solutions are evolving to meet financial institutions' needs. This session will highlight key Loan Vision modules designed to help customers adapt in today's evolving market. You'll also hear from our Continia about their commitment to innovation and partnership in driving growth across the mortgage industry. Discover how this collaboration is shaping the future of mortgage technology.

**4:00 PM - 5:00 PM**

### **UNLOCKING PROFITABILITY: ONE YEAR LATER - HOW AI IS TRANSFORMING FINANCIAL SERVICES WITH MICHAEL HAMMOND**

Explore how AI is transforming lending in financial services with real-world case studies with Michael Hammond. This session, designed for senior executives, covers practical AI strategies, success stories, and future trends to help mortgage banks improve risk, efficiency, and growth.

# TUESDAY, SEPTEMBER 23

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## User Track 1

**9:00 AM - 10:00 AM**

### **MAIN SESSION IN GRAND BALLROOM AB: KEYNOTE WITH MARINA WALSH**

Want a clear view of where the mortgage industry stands and where it's headed? Join MBA's Marina Walsh as she covers current market conditions, how mortgage banks and servicers are performing, and what to expect in the 2025 MBA forecast.

**10:15 AM - 11:15 AM**

### **MAXIMIZING LOAN IMPORT EFFICIENCY WITH GINA JOHNSON**

Join Gina Johnson, VP of Implementation, on mastering loan imports. Learn to update schemas, add fields, troubleshoot errors, connect data to your GL, and apply conditions, functions, and switch codes to streamline and enhance your loan processing.

**11:15 AM - 12:15 PM**

### **FURTHER LEVERAGING LOAN LEVEL RECONCILIATION AND REPORTING WITH GINA JOHNSON**

Join Gina Johnson, VP of Implementation, for a focused session on Loan Level Reconciliation and Reporting. Learn practical techniques and create key reports to streamline reconciliations, ensuring accuracy and efficiency in managing your balance sheet accounts.

**1:30 PM - 2:30 PM**

### **MAIN SESSION IN GRAND BALLROOM AB: ROB CHRISMAN**

Join industry veteran Rob Chrisman on the main stage as he shares his perspective on today's mortgage market. With decades of experience and a daily pulse on the industry, Rob will offer insights, trends, and commentary you won't want to miss.

**2:45 PM - 3:45 PM**

### **STREAMLINING APPROVALS: FASTER DECISIONS, STRONGER CONTROLS WITH JUSTIN DEANGELIS**

Join Justin DeAngelis, Customer Success and Engagement Manager, to learn how Loan Vision's approval options create controls, from cost center accuracy to catching potential fraud, so you can keep a close eye on expenses without constant oversight.

### **FEATURED SPEAKER:**

4:00 PM - 5:00 PM – John O'Leary in Grand Ballroom AB

# TUESDAY, SEPTEMBER 23

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## User Track 2

**9:00 AM - 10:00 AM**

### **MAIN SESSION IN GRAND BALLROOM AB: KEYNOTE WITH MARINA WALSH**

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**10:15 AM - 11:15 AM**

### **ROUND TABLE 1: REPORTING WITH JUSTIN DEANGELIS AND GINA JOHNSON**

Join Justin DeAngelis and Gina Johnson for an open forum on reporting: from quick Q&A to real-world examples of how Loan Vision's reporting capabilities are helping teams make smarter, faster decisions.

**11:15 AM - 12:15 PM**

### **UNLOCK THE POWER OF LV COMPENSATE WITH BEN SAUNDERS**

Join our COO and GM, Ben Saunders, for Unlock the Power of LV Compensate. Discover how LV Compensate combines a decade of Loan Vision's flexible commission logic with real-time visibility for LOs and managers—streamlining processes and driving efficiency. See why it's time to upgrade.

**1:30 PM - 2:30 PM**

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**2:45 PM - 3:45 PM**

### **GETTING MORE OUT OF YOUR FINANCIAL REPORTS WITH LOAN VISION**

Unlock the power of Loan Vision reporting. This session covers the essentials of Report Schemas and Period/Dimension Layouts, a refresher on building and maintaining financial reports. Whether refining or creating new reports, you'll learn how to connect the dots and maximize the value of your data.

### **FEATURED SPEAKER:**

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# TUESDAY, SEPTEMBER 23

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## Executive Track

**9:00 AM - 10:00 AM**

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**10:15 AM - 11:15 AM**

### **RESILIENCY OVER THE LAST FEW YEARS: NAVIGATING THE MORTGAGE INDUSTRY THROUGH UNCERTAINTY AND VOLATILITY WITH DUSTIN PFLUGER**

Join Dustin Pfluger and industry experts for a panel on navigating market volatility, building organizational resilience, and adapting to shifting consumer needs. Learn how top mortgage companies are leading through change with strategy and innovation.

**11:15 AM - 12:15 PM**

### **SEVEN DEADLY SINS OF MORTGAGE BANKERS WITH MICHAEL MCAULEY**

The mortgage market has been tough, with few banks earning profits, especially on originations. Mike McAuley, Principal of Garrett, McAuley & Co., will share how some clients managed to stay profitable on originations in 2023 and 2024, despite industry challenges.

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### **THE QUIET COLLAPSE: HIDDEN GAPS THAT DERAIL MORTGAGE BUSINESSES (AND HOW TO SPOT THEM BEFORE THEY BREAK YOU) WITH JULIA BROWN**

Most mortgage companies don't fail suddenly. They slowly lose their edge through hidden gaps in strategy, culture, and execution. Telescope Advisors' founder Julia Brown shares data-driven insights and a framework to help CEOs and CFOs spot warning signs early and prevent costly organizational decline.

### **FEATURED SPEAKER:**

4:00 PM - 5:00 PM – John O'Leary in Grand Ballroom AB

# WEDNESDAY, SEPTEMBER 24

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## User Track 1

**9:00 AM - 10:00 AM**

### **GRAND BALLROOM AB: TOWNHALL PANEL WITH THE LOAN VISION TEAM**

We invite you to an engaging session where you can discuss all aspects of Loan Vision with our experts. This session will be led by Justin DeAngelis, Customer Success & Engagement Manager, Gina Johnson, VP of Implementation, and Ben Saunders, COO & General Manager. Bring your questions and get answers directly from our team. We look forward to your participation!

**10:15 AM - 11:15 AM**

### **CASH MANAGEMENT/AP WITH JUSTIN DEANGELIS**

Join Justin DeAngelis, Customer Success and Engagement Manager, for an in-depth look at methods and processes that can reduce manual tasks and data entry, boost accuracy, and elevate your overall AP performance. Discover practical ways to work smarter, not harder.

**11:15 AM - 12:15 PM**

### **FILE IMPORT SCHEMA & FLEXIBLE IMPORT SCHEMA WITH JUSTIN DEANGELIS AND JEFF BINGHAM**

Join Justin DeAngelis, Customer Success and Engagement Manager, and Jeff Bingham, VP of Customer Success and Engagement, as they explore options for various data import needs. Learn how Loan Vision's out-of-the-box imports let you bring in large volumes of data with minimal manual effort and even apply business logic to eliminate the need for pre-entry manipulation.

### **GRAND BALLROOM AB**

12:15 PM - 12:30 PM - Closing with Carl Wooloff

# WEDNESDAY, SEPTEMBER 24

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## User Track 2

**9:00 AM - 10:00 AM**

### **GRAND BALLROOM AB: TOWNHALL PANEL WITH THE LOAN VISION TEAM**

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**11:15 AM - 12:15 PM**

### **ROUND TABLE 2: NEW BANK REC WITH GINA JOHNSON**

Join Gina Johnson, VP of Implementation, for an interactive round table on new bank reconciliation methods that connect directly to your bank. Share ideas, ask questions, and discover how this streamlined process saves time, increases accuracy, and simplifies your reconciliations.

### **GRAND BALLROOM AB**

12:15 PM - 12:30 PM - Closing with Carl Wooloff

# WEDNESDAY, SEPTEMBER 24

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## Executive Track

**9:00 AM - 10:00 AM**

### **BUILDING A RESILIENT AND AGILE ACCOUNTING TEAM TO WITHSTAND THE VOLATILITY WITH LIZZ PATNAUDE**

In volatile markets, a nimble accounting team is vital. Join Richey May's Lizz Patnaude as she covers strategies to build operational excellence through training, processes, and tools that help analyze margins and deliver actionable reports, equipping your team to drive success and adapt to changing market conditions.

**10:30 AM - 11:30 AM**

### **INNOVATION OR INTRUSION? BALANCING INNOVATION AND THIRD-PARTY RISK OF AI IN THE MORTGAGE INDUSTRY WITH PARKER BRISSETTE**

AI is transforming mortgage lending with new efficiencies and smarter risk management, alongside greater third-party risks. Richey May's Parker Brissette shares how to harness AI's benefits while safeguarding data, ensuring compliance, and strengthening vendor oversight in an evolving, AI-driven environment.

**11:30 AM - 12:30 PM**

### **LOAN VISION ROUNDTABLE WITH EXECUTIVE LEADERSHIP**

Join the Loan Vision Executive Leadership Team to discuss the future of Loan Vision. This session will cover new advancements, strategic enhancements, and the long-term vision for the platform. Participants will have the opportunity to share their perspectives on desired features and services, ensuring that Loan Vision continues to meet and exceed the evolving needs of the mortgage industry.

## **GRAND BALLROOM AB**

12:15 PM - 12:30 PM - Closing with Carl Wooloff