

# LOANVISION

## 2026 CONFERENCE AGENDA

# Loan Vision Innovation Conference

### DATES

September 14–16, 2026

### VENUE

Dallas Marriott Downtown

### LOCATION

650 N. Pearl St., Dallas, TX

### TRACKS

Main · User 1 · User 2 · Executive

#### Main — Plaza BC

General sessions and keynotes open to all attendees.

#### General Track — Cedars & Trinity

Designed to show users how to get the most out of Loan Vision by exploring functionality and best practices through master classes and workshops.

#### Executive Track — Pegasus AB

A mix of industry speakers, peer round tables, and Q&A sessions on key topics affecting mortgage banking finance departments.

### Monday, September 14 · 3rd Floor Lobby

| Time      | Main<br>3rd Floor Lobby |
|-----------|-------------------------|
| 5:30 PM – | Registration Open       |
| 5:30 PM – | Welcome Reception       |

#### Registration

Opens Monday at 5:30 PM in the 3rd Floor Lobby, followed by Welcome Reception. Pick up your badge Monday evening to skip the Tuesday morning queue.

#### Evening Events

Tuesday: Cocktail Hour and Awards Dinner, 6:00–7:45 PM.  
Wednesday: An Evening at the Rodeo, 6:30–10:00 PM. Guest tickets required.

#### CPE Credit

CPE is offered in the Computer Software and Applications category, plus additional categories across the Executive Track sessions.

#### Agenda Updates

Sessions marked “To Be Announced” will be confirmed ahead of the event. The current agenda is always posted at [loanvision.com/innovation-conference](https://loanvision.com/innovation-conference).

| Time          | Main<br>Plaza BC                                                                     | User Track 1<br>Cedars                                                          | User Track 2<br>Trinity                                                             | Executive<br>Pegasus AB                                                                                       |
|---------------|--------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|
| 8:00 – 8:45   | BREAKFAST                                                                            |                                                                                 |                                                                                     |                                                                                                               |
| 8:45 – 9:50   | The Future of Mortgage Accounting<br>Paul Loftus                                     |                                                                                 |                                                                                     |                                                                                                               |
| 9:50 – 10:00  | Product and Subscription Unveiling<br>Ben Saunders                                   |                                                                                 |                                                                                     |                                                                                                               |
| 10:00 – 10:20 | BREAK                                                                                |                                                                                 |                                                                                     |                                                                                                               |
| 10:20 – 10:30 | The Future of LV AP and Expense<br>Continia — Headline Sponsor                       |                                                                                 |                                                                                     |                                                                                                               |
| 10:30 – 11:20 | AI, Microsoft and YOU<br>Mason Whitaker, Volt Technologies                           |                                                                                 |                                                                                     |                                                                                                               |
| 11:20 – 12:20 | Old School vs. New School: Chrisman vs. Chrisman<br>Rob Chrisman and Robbie Chrisman |                                                                                 |                                                                                     |                                                                                                               |
| 12:20 – 1:30  | LUNCH                                                                                |                                                                                 |                                                                                     |                                                                                                               |
| 1:30 – 2:30   | Deep Dive Into Our Future: Luna<br>Loan Vision                                       |                                                                                 |                                                                                     |                                                                                                               |
| 2:30 – 2:45   | BREAK                                                                                |                                                                                 |                                                                                     |                                                                                                               |
| 2:45 – 3:45   |                                                                                      | Transforming Loan Imports with Automation<br>Gina Johnson and Adria Stoner      | Round Table: What's Possible with APIs?<br>Justin DeAngelis and Brandy Buschel      | The Bermuda Triangle of Mortgage Operations<br>Michael McAuley                                                |
| 3:45 – 4:00   | DRINKBREAK                                                                           |                                                                                 |                                                                                     |                                                                                                               |
| 4:00 – 5:00   |                                                                                      | Mastering File and Flexible Import Schemas<br>Jeff Bingham and Justin DeAngelis | Transforming Loan Imports with Automation (Repeat)<br>Gina Johnson and Adria Stoner | Winning the Mortgage Cycle: Margin, Leadership, and Technology in a Volatile Market<br>Dustin Pfluger + Panel |
| 5:00 – 6:00   |                                                                                      | Automate AP. Simplify Expenses.<br>Gina Johnson and Adria Stoner                | Smarter Bank Connections & Reconciliation<br>Justin DeAngelis and Jeff Bingham      | Ctrl + Alt + Delegate: Letting AI Do the Work (Safely)<br>Michael Nougulier and Lizz Patnaude                 |
| 6:00 – 7:00   | Cocktail Hour                                                                        |                                                                                 |                                                                                     |                                                                                                               |
| 7:00 – 7:45   | Awards Dinner                                                                        |                                                                                 |                                                                                     |                                                                                                               |

| Time          | Main<br>Plaza BC                        | User Track 1<br>Cedars                                                    | User Track 2<br>Trinity                                                                     | Executive<br>Pegasus AB                                                                                                                   |
|---------------|-----------------------------------------|---------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| 8:00 – 8:45   | BREAKFAST                               |                                                                           |                                                                                             |                                                                                                                                           |
| 8:45 – 9:45   | Mortgage Market Outlook<br>Marina Walsh |                                                                           |                                                                                             |                                                                                                                                           |
| 9:45 – 10:45  | Session To Be Announced<br>Garth Graham |                                                                           |                                                                                             |                                                                                                                                           |
| 10:45 – 11:00 | BREAK                                   |                                                                           |                                                                                             |                                                                                                                                           |
| 11:00 – 12:00 | Townhall<br>Loan Vision                 |                                                                           |                                                                                             |                                                                                                                                           |
| 12:00 – 1:00  | LUNCH                                   |                                                                           |                                                                                             |                                                                                                                                           |
| 1:00 – 1:30   |                                         | Sponsor Showcase<br>Continia                                              | Sponsor Showcase<br>Accu-Keep                                                               | Sponsor Showcase<br>insightsoftware                                                                                                       |
| 1:30 – 2:00   |                                         | Sponsor Showcase<br>Cosmos                                                | Sponsor Showcase<br>Volt Technologies                                                       | Sponsor Showcase<br>To Be Announced                                                                                                       |
| 2:00 – 2:15   | BREAK                                   |                                                                           |                                                                                             |                                                                                                                                           |
| 2:15 – 3:15   |                                         | Compensation Without the<br>Spreadsheets<br>Gina Johnson and Ben Saunders | Mastering File and Flexible Import<br>Schemas (Repeat)<br>Jeff Bingham and Justin DeAngelis | AI Across the Loan Lifecycle: How<br>CFOs Can Cut Costs, Compress Cycle<br>Times, and Strengthen Financial<br>Controls<br>Michael Hammond |
| 3:15 – 3:30   | DRINK BREAK                             |                                                                           |                                                                                             |                                                                                                                                           |
| 3:30 – 4:30   | Motivational Speaker<br>To Be Announced |                                                                           |                                                                                             |                                                                                                                                           |
| 4:30 – 6:30   | BREAK                                   |                                                                           |                                                                                             |                                                                                                                                           |
| 6:30 – 10:00  | An Evening at the Rodeo                 |                                                                           |                                                                                             |                                                                                                                                           |