

# User Conference Agenda

Wednesday, June 6th

6:30 PM to 8:30 PM — Cabana

## COCKTAIL RECEPTION

This cocktail reception is open to all attendees. Did someone say, free drinks?

Thursday, June 7th

8:00 AM — Prefunction AB

## EXPO HALL & REGISTRATION OPEN

Registration will be open all day for attendees to pick up their badges within the Expo Hall outside of the main Ball Room.

8:00 AM — Cabana

## BREAKFAST

8:45 AM — Salon AB

## OPENING GENERAL SESSION

- 8:45 AM — Welcome Remarks from LendingQB's Director of Sales & Marketing Linn Cook.
- 9:00 AM — KEYNOTE SPEAKER: Rod Lake from Costner Lake Investments
- 10:00 AM — LendingQB Team Leader Introductions

### KEYNOTE SPEAKER: Rod Lake, Costner Lake Investments

Rod is 1 part curious optimist, 2 parts veteran entrepreneur, 3 parts motorcycle racer and 4 parts grateful partner.

With over 40 years experience as a Company Founder he has helped create companies that include Relocation West, Westech Expocorp, HTC Publishing, Jobs America, American Made Suspension, Airborne Health, Water Planet Inc, Lender Price and Vejo. These companies all share one fact: They all achieved outstanding success in their product categories.

- As a film and Television producer, he has produced award winning Theatrical and Documentary Films.
- He has helped create over \$1.4 Billion in shareholder value.
- Rod attended 23 schools by the time he graduated from Leland High School in 1974...barely graduating.
- Rod starts every relationship off with one question "How can I help?"

10:30 AM — Prefunction AB

## COFFEE BREAK

11:00 AM — Salon AB

## LendingQB's INNOVATION ROADMAP

LendingQB's Vice President of Strategy David Colwell will present LendingQB's Roadmap to attendees. Including OCR, Construction Lending, New UI, URLA, and various digital mortgage enhancements.

12:00 PM — Cabana

## LUNCH BREAK

This is a seated lunch and will provided to all attendees.

1:45 PM

Salon A

### THE IMPORTANCE OF THE BORROWER EXPERIENCE ON LENDER PERFORMANCE WITH STRATMOR GROUP

This Breakout Session will be hosted by STRATMOR Group to discuss some of the key insights they have gathered from their Mortgage Sat Surveys and to utilize that information to enhance the borrower experience and Lender performance.

Salon B

### FNMA AND LENDINGQB DISCUSS NEW URLA CHANGES & THE LENDER EXPERIENCE IN LENDINGQB

LendingQB staff and FNMA will be explaining how the new URLA changes for 2020 will affect the Lender's Processes working with the GSE's, their LendingQB user experience and the timing of when those changes will be rolled-out to our lenders.

*Kevin Gunnels, Product Design Engineer (LQB)*

*Denise Rivoal, Senior Manager of Strategic Product Management - Single-Family (Fannie Mae)*

3:00 PM — Prefunction AB

### COFFEE BREAK

3:45 PM

Salon A

### THE POWER OF THE API - LEVERAGING OUR INTEGRATION CAPABILITIES

The lendingQB Integrations team, will answer common questions asked about our integrations process and Mark Gerster will share his experience and insight related to using the LendingQB webservices to integrate a complex and comprehensive TPO portal. This time will also be dedicated to giving lenders an insight to the full capabilities of our Generic Framework and the potential of custom integrations to streamline the lending process.

*Joseph Joyce, Integration Analyst (LQB)*

*Michal Muller, Integration Success Engineer (LQB)*

*Mark Gerster, Product Manager (Parkside Lending)*

Salon B

### "YOU CAN'T MANAGE WHAT YOU DON'T MEASURE" - BUSINESS INTELLIGENCE AND METRICS MANAGEMENT

David Colwell from LendingQB will moderate a panel discussion to gain perspectives and insight from clients regarding their approach and recommend best practices for leveraging LendingQB data to effectively measure their business and drive productivity.

*David Colwell, Vice President of Strategy (LQB)*

*Anthony Pham, Chief Financial Officer (JMAC Lending)*

*Nick Whitten, Head of Secondary (Open Mortgage)*

5:30 PM to 9:00 PM  
— Newport Harbor

### HARBOR BOAT CRUISE SPONSORED BY DOCUTECH

Attendees interested in attending the Harbor Cruise will have to be ready to depart from the Hotel aboard our provided shuttles at 5:30 PM. The boat will leave the dock at 6:00 PM and will include dinner and drinks at no additional cost to attendees. Come enjoy beautiful Newport Beach with us and DocuTech!

Friday, June 8th

8:00 AM — Prefunction AB

## EXPO HALL & REGISTRATION OPEN

Registration will be open all day for attendees to pick up their badges within the Expo Hall outside of the main Ball Room.

8:00 AM — Cabana

## BREAKFAST

8:30 AM

Salon A

## INNOVATION WHITE BOARD A

This session is important to LendingQB! In Salon A and Salon B we will be hosting roundtable discussions about our Roadmap to gain perspective from you, our Lender Partners, on functionality you would like to see in LendingQB. Please take this time to provide us with insight on what LendingQB features would benefit you the most.

Salon B

## INNOVATION WHITE BOARD B

10:00 AM — Prefunction AB

## MEET THE VENDORS COFFEE BREAK

Take this time aside to come meet our integration partners that have sponsored the conference! This is your free time to wander the conference and network with LendingQB staff and industry professionals.

11:00 AM

Salon A

## HOW TO ENSURE THAT YOUR POS IS NOT A "POS"

This roundtable hosted by LendingQB will focus on lessons learned from our Lenders related to evaluating, selecting and implementing the Digital Lending Point of Sale Solution that aligns with their business objectives.

Salon B

## ADOPTIMIZING YOUR SYSTEM, WHY DO IT?

Technology by itself is just a tool. In order for lenders to be more successful, they need to fully adopt the technology and utilize it in accordance with best practices. Adoptimization is the methodology that LendingQB uses to help clients optimize their utilization of our system. This session will provide an overview of the Adoptimization process and features Greg Uttal from Cyberlink Software Solutions, a LendingQB partner that has provides Adoptimization services to several clients.

*Greg Uttal (Cyberlink Software Solutions)*

12:15 PM — Cabana

## LUNCH BREAK

This is a seated lunch and will provided to all attendees.

1:30 — Salon AB

## SPEAKER: RICK LANG, VP CUSTOMER TECHNOLOGY INTEGRATIONS FROM FREDDIE MAC

2:30 — Salon AB

## CLOSING REMARKS

This speech will be given by LendingQB's Vice President of Strategy David Colwell.