

Loan Vision User Conference Agenda

Sunday, September 22, 2018 (2:00pm – 7:00pm)

Timeline	
2:00pm – 6:00pm	Registration
Room:	
5:00pm – 6:00pm	Executive Roundtables
Room:	
6:00pm – 7:00pm	Opening Reception

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Monday, September 23, 2018 (7:00am - 5:15pm)

Timeline	Executive Track	LV Lab	User Track	
7:00am - 9:15am	Registration			
8:00am - 9:15am	Breakfast			
Room:				
9:15am - 10:15am	Key Note			
10:15am - 10:30am	Session Intermission			
Room:				
10:30am - 12:00pm	Forecasting: Weathering the Mortgage Industry	LV Lab	Imports: The Basics	Commanding Better Commissions
	An inside look at Loan Vision's new Advanced Budgeting and Forecasting Tool, as well as a few tips on proper forecasting.		An overview of how to use the out-of-the-box imports in Loan Vision and creating standard imports	An overview of common issues and tips to use the commissions module more efficiently
12:00pm - 1:00pm	Lunch			
Room:				
1:00pm - 2:30pm	On the Mind of Mortgage Execs	LV Lab	Mastering Your Loan Management	Mapping the Way Through Loan Vision
	Bringing back the popular panel of mortgage executives, BKM's Dustin Pfluger will lead a discussion covering topics affecting the industry, from GAAP Standard Changes to Budgeting and Forecasting.		A walk through of building and maintaining loan imports, functions and conditions, and mapping dimensions	A look into the mapping and G/L mapping imports and how to use them in multiple areas of Loan Vision
2:30pm - 2:45pm	Session Intermission			
Room:				
2:45pm - 4:00pm	New Leasing Standards: Are You Ready?	LV Lab	Concur	Advanced Uses of the Processing Schema
	Santo Chiarelli of Acquavella, Chiarelli, Shuster, LLP offers an overview of the ASC 842 Leasing Standards and the impact they will have on your accounting department.		An interactive look into utilizing Concur Expense and how Loan Vision Customers are currently leveraging the tool.	A continuation of Mastering Your Loan Management, users will dive further into functions and conditions, as well as tackle switches and net zero transactions.
4:00pm - 4:15pm	Session Intermission			
Room:				
4:15pm - 5:15pm	Countdown to ASC 842: A Look at Loan Vision's Lease Management Tool			
	A look at Loan Vision's new Lease Management Tool and how it will help with the new ASC 842 standards.			

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Tuesday, September 24, 2018 (8:00am - 5:15pm)

Timeline	Executive Track	LV Lab	User Track	
8:00am – 9:00am	Breakfast			
Room:				
9:00am – 10:15am	Useful Metrics and Business Intelligence Tools for the Mortgage Industry	LV Lab	Be a 'Rec'-ing Ball	Jet Reports and Analytics
	Jennifer Hannah, from Richey May & Co., joins us to talk about utilizing the information mortgage banks can gain from different BI tools.		A look at the loan reports users have to help reconcile loan level activity and how to use them accordingly.	A look into utilizing Jet Global for making better data driven decisions and how Loan Vision Customers are currently leveraging the tool.
10:15am – 10:30am	Session Intermission			
Room:				
10:30am – 12:00pm	How Companies are Using Outsourcing to Manage Market Fluctuations	LV Lab	Intro to Reporting	Managing Your Close
	Join the team from CWDL as they cover how to leverage vendor partnerships while managing the changes in the market.		An overview of canned reports in Loan Vision	A look at Loan Vision's Closing Manager and tips on how to have a smooth month end close From Loan Vision President Martin Kerr.
12:00pm – 1:00pm	Lunch			
Room:				
1:00pm – 2:30pm	Warehouse Lender Concerns	LV Lab	User Round Table	Leveraging Your Reports
	Henry Chavez of Spiegel Accountancy Corp leads this session, delving into transparency in financial statements, forecasting, and the risk of changing accounting personnel in financial statement reporting.		Users will have a chance to give their opinions and hear best practices from other users in specific areas of Loan Vision	Get a deeper look into reporting, including analysis views in account schedules, and how to leverage and create more advanced reports.
2:30pm – 2:45pm	Session Intermission			
Room:				
2:45pm – 4:00pm	The Coming Disruption in Residential Lending: A CFO's Perspective	LV Lab	What's Your Trouble(shooting)	
	A special session from Jim Deitch of Teraverde where he discusses the topic of his upcoming book, <u>The Coming Disruption in Residential Lending</u> .		A look at common errors that may arise within the Loan Vision system and how to identify the source of those errors.	
4:00pm- 4:15pm	Session Intermission			
Room:				
4:15pm- 5:15pm	Closing			
	An interactive look into what our customers are looking for in their accounting solution, what may already be there, and what is coming to the Loan Vision System, followed by a closing statement from Martin Kerr, President of Loan Vision.			