



8:00AM

Registration Opens & Breakfast in the Exhibit Hall

9:00AM

Welcome by eSignRecords Chairman

**Richard Grisham** | AVP, Operations & Engineering, *iPipeline*

9:15AM

ESRA - Get Involved in Our "Your" Mission

*What is ESRA all about and why get involved?*

**John Levy** | Chairman, ESRA/EVP, *IMM*

9:30AM

ESRA Standards: Defining the Future of eSigned Records

*eSigned documents are increasingly relied upon by third party organizations who need to understand how documents were signed, users were authenticated, and transaction details preserved. ESRA is embarking on its first standards setting effort. This session explains ESRA's standards process, what these standards may mean to you, and how you can participate in the standards process.*

**Bill Brice** | CEO, *AlphaTrust*

9:45AM

Betting & Winning on eSignatures

*Transforming a conservative, paper-based and risk-averse industry is nearly impossible, unless you've got a strong will and a fervent belief. Hear Bill Atlee tell the story of how he bet his career - and his company - on the hope that digital signatures could revolutionize the 200-plus-years-old life insurance industry.*

**Bill Atlee** | CSO, *iPipeline*

10:30AM

Networking Break in the Exhibit Hall

11:00AM

The Latest in Regulations & Law

*This session will review the major 2016 legal developments affecting electronic signatures and records, including: 1) Judicial decisions on the enforceability of electronic promissory notes; 2) Judicial guidance on proving attribution of disputed signatures; 3) Legislative proposals at the state level threatening technology neutrality; 4) Accelerating acceptance of eNotarization and Remote Notarization by state and local governments; 5) SmartContracts including electronic agents/emerging practices and International adoption*

**Margo Tank** | Partner, *BuckleySandler*

**David Whitaker** | Senior Counsel, *BuckleySandler*

11:45AM

Lunch & Networking in the Exhibit Hall

12:15PM

Keynote: Cyberthreats, Challenges & Perspectives

*Keith Alexander is a retired four-star general of the United States Army who served as Director of the National Security Agency, Chief of the Central Security Service and as the first Commander of the United States Cyber Command. General Alexander will provide insight into the cyber threats and a perspective on how to address these challenges.*

**General (Ret) Keith Alexander** | President & CEO, *IronNet Cybersecurity, Inc*



1:30PM

## Panel: eMortgage - The Holy Grail

*Ten months into TRID, both lenders and title companies are still struggling with implementing more efficient processes to support compliance. The other shoe (enforcement) hasn't even fallen as the FHFA has come up with another disruptive regulation, the Uniform Closing Dataset (UCD) that may finally put the last nail in the paper coffin forcing participants to implement a total electronic process to ensure proof of compliance. This session will cover how implementing a total electronic process will support the CFPB's Compliance Management System(CMS) mandate and provide electronic proof of evidence to ensure lenders' ability to defend against for future compliance audits or borrower challenges.*

**Moderator: Nancy Pratt** | VP Partner Affairs & Govt. Regulations, *Pavaso*

**Noerena Limon** | Office of Mortgage Markets, *Consumer Financial Protection Bureau*

**Tim Anderson** | Director of eServices, *DocMagic*

**Stephen Bisbee** | President & CEO, *eOriginal*

2:30PM

## Networking Break in the Exhibit Hall

3:00PM

## GSE Spotlight: Data Standards, Compliance & Investor Confidence

*The Uniform Mortgage Data Program (UMDP) is a multi-year effort by Fannie Mae and Freddie Mac to align their various data delivery requirements with industry standards while updating them to use the latest technologies like XML Schema. This panel of experts will describe the UMDP program, the current state of the MISMO Reference Model, and how uniform data saves time and money for everyone while providing the foundation for achieving loan quality with "Day 1 Certainty" during investor loan delivery.*

**Moderator: Harry Gardner** | EVP of eStrategies, *DocuTech*

**Natalie Hunt** | Director of Product Development, *Fannie Mae*

**David Barkley** | Director of Business Initiatives, *Freddie Mac*

4:00PM

## Panel: Electronic Record Retention Principles

*Best practices discussion on governance and maintenance of electronic records including access to eRecords when a software/system becomes obsolete. This session will include any relevant litigation & regulatory updates related to electronic record retention.*

**Moderator: Curt Moy** | Assistant Vice President, Enterprise Operations Counsel, *USAA*

**Jerry Buckley** | Partner, *BuckleySandler LLP*

**John J. Isaza** | Partner, *Rimon, PC, Law Firm Evolved*

4:45PM

## Taking The Leap - Achieving Extraordinary Results

*Transforming from paper to digital can be full of political landmines and hazardous to your career if you're not positioned for success. Hear practical and powerful methods to finally take the leap - enabling you and your organization to achieve extraordinary results.*

**Kevin Baer** | Partner, *MPact*

5:30PM

## Networking Reception in the Exhibit Hall



8:00AM | Networking Breakfast in the Exhibit Hall

## Bitcoin, Blockchain & Smart Contracts: Today & Tomorrow

*Smart Contracts are essentially shared agreements between individuals and businesses governed by self-executing computer programming, and has the potential to bring both predictability and clarity to business transactions. In this panel we will discuss the fundamental principles of smart contracts, how they are used with distributed ledgers and blockchains, potential applications and use cases, their impact on the financial services sector and other markets, and challenges to adoption.*

8:30AM

**Moderator: Perianne Boring** | Founder & President, Chamber of Digital Commerce

**Chris Grillone** | Vice-President of Business Development, Civic Technologies

**Michael S Maloney** | Manager, FSO Blockchain Strategy, Ernst & Young LLP

**Margo Tank** | Partner, BuckleySandler

## Reinventing Identity for the Digital Age

*The problem of identity – building trust and weeding out bad actors while safeguarding user privacy – is one of the fundamental challenges of the digital age. Identity cuts across various disciplines in business, technology and public policy, from fraud prevention and cybersecurity to anti-money-laundering compliance to financial and social inclusion. This panel will explore the leading edge of technologies aimed at solving these interconnected challenges in a holistic way that reduces the amount of sensitive information exchanged and gives consumers greater control over their data. Special attention will be given to the opportunities for financial institutions to serve as trusted identity providers.*

9:30AM

**Moderator: Marc Hochstein** | Editor-in-Chief, American Banker

**Louie Gasparini** | Entrepreneur in Residence, BBVA Compass

**Adam Madlin** | Senior Business Development Executive, Symantec

**Joel Hardi** | Director of Solutions Architecture, Equifax

**Keir Breitenfeld** | Senior Business Consultant, Experian Decision Analytics

**Chris Grillone** | Vice-President of Business Development, Civic Technologies

## Maximizing eSignature ROI

*Achieving a solid return on your e-signature investment can be easy, as long as you focus on the right things. Everyone has exception cases; in this session you'll hear tactics on handling the '90%' rather than the exceptions to power rapid ROI and overall implementation success.*

10:30AM

**John B. Fraser** | President, Core

11:00AM | Networking Break in the Exhibit Hall

## New EU Regulation eIDAS & Its Effect on Global Commerce

*This will be a discussion on the newly enacted eIDAS regulation, which governs electronic signature across the EU. The new regulation presents tremendous opportunity for businesses both within and outside the EU, by simplifying and streamlining the laws in Europe, and removing barriers to implementing electronic signature.*

11:30AM

**Rachel Stoermer** | Senior Corporate Counsel, DocuSign

12:00PM | Lunch & Networking in the Exhibit Hall



- 1:15PM** | **Taking the Digital Dive & Growing Stronger**  
*Diving into the digital world can be exciting and rewarding...until you're faced with red tape, nay-sayer and the like. In this session, you'll discover strategic ways to onboard your team by leveraging new business opportunity and gaining a competitive edge while saving money in the process. See what it means to turn your digital strategy into a differentiating diamond.*  
**Felicia Pope** | VP Marketing, ArrowPointe Federal Credit Union
- 1:45PM** | **How Marketplace Lending is Accelerating the Digital Transformation of Financial Services**  
*Despite recent turbulence surrounding it, Marketplace Lending continues to have a notable impact on the Financial Services space and encourages a traditionally conservative and methodical industry to adopt digital technologies and transform the way banks interact with customers, investors, regulators, and all of their key stakeholders. As a pioneer in Marketplace Lending, Barlow has seen the highs and lows of this rapidly growing industry and watched banks and institutional investors navigate the new, technology-driven model of lending and investing.*  
**Jon Barlow** | Founder & Former CEO, Eaglewood Capital
- 2:30PM** | **eTitling for the Auto Industry**  
*Businesses and government entities serving the consumers and automobile industry are rapidly moving to eliminate the manual, paper process involved with purchasing, financing, and remarketing vehicles. This session will provide an overview of the national and state initiatives for obtaining the goal of a total electronic process for vehicle titling, known as eTitling, and highlight successes in overcoming barriers to the process.*  
**Moderator: Mark A. Zalewski** | Director ebusiness Solutions, American Financial Services Association  
**Betty Johnson** | Administrator, Driver and Vehicle Records Division, Nebraska Department of Motor Vehicles  
**Ann Gunning** | Chief Information Officer, Decision Dynamics, Inc  
**Lea G. Strickler** | Titles Manager, Harley-Davidson Financial Services, Inc
- 3:15PM** | **Industry Spotlight: eNotary & eRecording**  
*This panel will share information on the current status of state eNotary and county eRecording adoption plus an end-user perspective on what this all means to companies that embrace this technology and their end users. Part of this effort relies on understanding how eNotary and eRecording can make it easier for consumers to fully execute agreements electronically and the benefits that lie therein.*  
**Marc L. Aronson** | President & CEO, Pennsylvania Association of Notaries  
**Mark Ladd** | Vice President, Regulatory & Industry Affairs, Simplifile  
**Catherine Cain** | Associate Vice President, Regulatory Affairs, Guaranteed Rate
- 4:00PM** | **Open Mike: What's on Your Mind**
- 4:15PM** | **Concluding Comments**
- 4:30PM** | **Conference Adjourns**