



NATIONAL SETTLEMENT SERVICES SUMMIT (NS3)

@TheSummit_NS3

Monday, June 16

10 am - 6:00 pm

3rd Floor

Registration Open

12:00 - 6:00 pm

3rd Floor

Exhibitor Floor Open

12:00 - 6:00 pm

Allegheny III Ballroom

3rd Floor

Networking Pub

Sponsored by



1:00 - 2:50 pm

Allegheny II Ballroom

3rd Floor

General Session | AI in Housing and Leadership: Clear Steps, Real Impact with a Fireside Chat

AI is showing up fast—and it's not just a tech issue, it's a leadership one. What can leaders do to get their teams and organizations ready? Brian Carter will walk through a simple framework to spot real AI opportunities, ask the right ethical questions, build a culture that's open and make sure your people have the skills they need before you automate. Find the balance—between risk and reward, speed and care, human and machine.

Sponsored by



Brian Carter, CEO, Optymedia

Cartree Pettis, Director of Product Implementation, Ardán

Erica Meyer, CEO & Publisher, October Research, LLC

2:50 - 3:20 pm

3rd Floor

Networking Break with Exhibitors

Sponsored by



3:20 - 4:10 pm

Allegheny II Ballroom

3rd Floor

Leveraging Instant Payments in Real Estate Transactions

Strategies to effectively and compliantly integrate instant payments into your workflow. Explore their benefits, challenges and leave with practical insights on maximizing their advantages while avoiding potential pitfalls.

Tim Boike, Vice President of Strategic Industry Engagement, Federal Reserve Financial Services

Rick Bruhn, SVP, Head of Specialty Deposit and Payment Solutions, Associated Bank

James Colassano, SVP, Product Development and Strategy, The Clearing House

4:10 - 5:00 pm

Allegheny II Ballroom

3rd Floor

Optimizing Bank-Title Partnerships for Seamless Closings

Dive into the power of collaboration between title agents and mortgage lenders, highlighting ways to enhance their partnership for smoother closings. Learn how title agents can attract more referrals from lenders and build mutually beneficial relationships. The speakers will also discuss how this synergy can

enhance the homebuyer experience, ensuring faster, more seamless transactions. Join us for an engaging discussion on optimizing these crucial partnerships for a more efficient and successful closing process.

Keith Dutton, SVP - Mortgage Fulfillment Operations, Flagstar Bank

T.J. Harrington, SVP National Product and Sales Enablement, Stewart Lender Services

Kate Steineman, SVP, Business Execution Senior Manager, Wells Fargo Home Lending

Tracy Zobel, EVP, Client Experience, Rocket Close

4:55 pm

Crawford West

3rd Floor

Make A Child Smile Community Outreach Event

Sponsored by



5:00 - 6:00 pm

3rd Floor

Opening Night Reception

Exhibitor Floor

Sponsored by



Tech Tools for Tomorrow

12:00 - 5:00 pm

Crawford West, 3rd Floor

- 12:00 pm - SoftPro
- 12:15 pm - Dono.ai
- 12:30 pm - Client2Vendor
- 2:15 pm - AtClose
- 2:30 pm - Informer
- 2:45 pm - TitleLOOK
- 3:30 pm - Zitles
- 3:45 pm - Qualia
- 4:00 pm - MaestroX
- 4:15 pm - Pippin Title

*All times Eastern Time. Times and events are subject to change.

Tuesday, June 17

7:45 am - 5:00 pm

3rd Floor

Registration Open

7:45 am - 5:00 pm

3rd Floor

Exhibitor Floor Open

7:45 am - 5:00 pm
Allegheny III Ballroom
3rd Floor

Networking Pub

Sponsored by
 AmTrust Title

7:45 - 8:30 am
3rd Floor

Subscriber Appreciation Open House

Invitation Only - Breakfast will be served

Pennsylvania Ballroom, 2nd Floor

Networking Breakfast with Exhibitors

Sponsored by
 **OCTOBER RESEARCH** KNOWLEDGE... THE COMPETITIVE ADVANTAGE

8:30 - 9:30 am
Allegheny II Ballroom
3rd Floor

General Session | Housing Innovations

Kick off Day 2 of NS3 with a jolt of energy and insight. This fast-paced, Power Session redefines the general session format with a series of 20-minute segments—each one packed with actionable strategies and bold ideas. Designed to address today's toughest housing challenges, these high-impact presentations will spotlight innovative, real-world solutions from industry leaders. Get ready to be inspired—and equipped—to drive change in your market.

Wendy Penn, VP, Affordable Housing Initiatives, Mortgage Bankers Association (MBA)

Amy Shaftlein, Executive Director, United Housing, Inc. / Convergence Memphis

9:30 - 9:40 am

Make A Child Smile Presentation

9:40 - 10:40 am
Allegheny II Ballroom
3rd Floor

Power Hour on the Exhibitor Floor

Staying ahead in today's fast-paced world means keeping up with the latest technology and business solutions designed to tackle your daily challenges. That's why we've created the **Power Hour**—your dedicated time to connect with top solution providers on the exhibit floor. Take advantage of this opportunity to explore cutting-edge innovations, network with industry leaders and stay informed on the latest developments—all without missing a single educational session. Don't miss this chance to power up your knowledge and stay ahead of the curve!

Sponsored by
 25 YEARS THE TITLE REPORT

10:40 - 11:30 am
Concurrent
Allegheny II Ballroom
3rd Floor

Compliance | The Regulatory Frontline: Perspectives from State Leaders

State regulators share candid perspectives on the latest regulatory trends and priorities affecting professionals across the real estate transaction. Learn what's needed to stay compliant and navigate the evolving regulatory environment.

Susan Apel, Senior Deputy Attorney General, Office of Pennsylvania Attorney General, Bureau of Consumer Protection

Chuck Myers, Deputy Commissioner Office of Property and Casualty, Louisiana Department of Insurance

Mary Schuster, Chief Knowledge Officer, October Research, LLC

10:40 - 11:30 am
Concurrent
Westmoreland Central
2nd Floor

Sales & Marketing | Marketing Metrics that Matter

Uncover the key marketing metrics driving business growth and help you focus your efforts where they count. Learn how to effectively search for and identify high-quality leads and determine what percentage

of revenue should be allocated to a healthy marketing budget. Understand the optimal engagement timeline for your marketing programs before leads are ready to be handed off to sales. Whether you're fine-tuning your marketing strategy or looking to boost lead generation, this session will equip you with the knowledge you need to maximize ROI and drive measurable results.

Sabrina Bier, *Director of Digital Media and Education*, Proper Title
Bradley Erb, *VP, Growth and Partnerships*, Bowe Digital

10:40 - 11:30 am

Concurrent

Pennsylvania Ballroom

2nd Floor

Technology Forum

Attendees are invited to join a guided discussion on the use and application of technology. Be prepared to share the successes and challenges you've faced along the way, so we can collaborate to optimize efficiency and meet customer expectations.

Rick Diamond, *VP - Information Technology, Agency Operations*, FNF Family of Companies
Shawn Fox, *Chief Revenue Officer*, Premier One

11:40 - 12:30 pm

Concurrent

Allegheny II Ballroom

3rd Floor

Compliance | Balancing Compliance, Risk and Efficiency: A Real-World Approach to Cybersecurity

Cybersecurity is a critical concern in real estate, and negligence can have severe consequences. In this session, we'll walk you through the risks of being found negligent in your cybersecurity practices or involved in a data breach. Learn about the compliance requirements you must follow, the steps to take after a breach and the policies to implement to avoid costly legal and financial mistakes. Understand how to protect your business and stay compliant in a rapidly evolving regulatory climate.

Stan Czaja, *SVP, Central Region Manager & Underwriting counsel*, WFG National Title Insurance Co.
James Chou, *Senior Associate*, Orrick

11:40 - 12:30 pm

Concurrent

Westmoreland Central

2nd Floor

Sales & Marketing | Science of Sales

Explore the key elements of successful sales strategies, focusing on measuring what works, setting clear, impactful goals and applying proven tactics to accelerate the journey from lead to sale. Learn how to shift from simply signing contracts to actively hunting for opportunities. The speakers will discuss what to do when things don't go as planned, sharing real-world examples of challenges faced and how to overcome them. Join us for actionable takeaways to refine your sales process and drive better results.

Amy Gregory, *President*, Florida Agency Network
Dave Nichols, *VP - Western Michigan Division*, Lighthouse Title Group

11:40 - 12:30 pm

Concurrent

Pennsylvania Ballroom

2nd Floor

Meet Your Regulators

Connect with industry regulators and advocates in an informal setting to engage directly with those shaping the rules and regulations. Ask questions, clarify compliance concerns and seize the opportunity to build relationships while staying informed.

Susan Apel, *Senior Deputy Attorney General*, Office of Pennsylvania Attorney General, Bureau of Consumer Protection
Angela Crooker, *Manager RESA Investigations Section, Agent Regulation Division*, Virginia Bureau of Insurance
Chuck Myers, *Deputy Commissioner Office of Property and Casualty*, Louisiana Department of Insurance
Susan Nicolson, *Commissioner*, Arizona Department of Real Estate

12:30 - 2:00 pm

Pennsylvania Ballroom

and Penn City Grille

2nd & 1st Floors

Networking Lunch



2:00 - 2:30 pm

Concurrent

Allegheny II Ballroom

3rd Floor

Compliance | Responding to Increased Scrutiny of RESPA

With new leadership at the CFPB, the future of RESPA enforcement is evolving. Explore how RESPA enforcement may change under this administration, potential shifts in legal interpretation, and the rise of state-level investigations, particularly for affiliated businesses. Learn what to expect, how to stay compliant and the strategies to navigate the shifting regulatory priorities.

Chuck Cain, SVP National Agency, FNF Family of Companies

Holly S. Bunting, Partner, Mayer Brown

Francis "Trip" Riley, Partner, Saul Ewing LLP

Marx Sterbcow, Managing Attorney, The Sterbcow Law Group

2:00 - 2:30 pm

Concurrent

Westmoreland Central

2nd Floor

Sales & Marketing | Turn Lessons Into Action: Craft Your Business Playbook

Engage in an interactive discussion where you can ask questions, explore strategies and learn from others' successes and challenges. Walk away with fresh ideas and practical takeaways to refine your approach and achieve better results in your sales and marketing efforts.

Deb Grace, EVP of Business Development, AccuTitle

Mark Holley

2:40 - 3:30 pm

Concurrent

Allegheny II Ballroom

3rd Floor

Compliance | Regulatory Shifts and Industry Challenges

As the regulatory environment evolves, real estate professionals must stay ahead of key changes affecting both businesses and consumers. This session covers the latest shifts, including MBA proposals, inducement regulations and more at the state and federal levels. Learn strategies to navigate these challenges and ensure compliance as regulations continue to evolve.

Chuck Cain, SVP National Agency, FNF Family of Companies

Holly S. Bunting, Partner, Mayer Brown

Francis "Trip" Riley, Partner, Saul Ewing LLP

Marx Sterbcow, Managing Attorney, The Sterbcow Law Group

2:40 - 3:30 pm

Concurrent

Westmoreland Central

2nd Floor

Sales & Marketing | Engaging Partners: Fresh Approaches for Lasting Relationships

Learn to build strong, lasting relationships extending well beyond the initial engagement. Discover strategies for making a positive impact from the very first interaction, maintaining communication throughout the process and nurturing connections after closing. Turn a one-time transaction into lasting partnerships driving future business.

Jenny Martin, SVP, Chief Business Development Officer and National Division Manager, Futura Title & Escrow

Bart Shaw, Sales & Marketing, Knox-Title

3:30 - 4:00 pm

3rd Floor

Networking Break with Exhibitors

Sponsored by



4:00 - 5:00 pm

Allegheny II Ballroom

3rd Floor

What Do You Mean You Can't Tell a Joke...You're In Real Estate!!!

October Research is pleased to welcome back fan favorite Phil Schulman. Phil retired several years ago after a distinguished career as a leading consumer finance attorney. We all remember Phil's informative educational presentations that were always peppered with jokes and amusing stories. Now he's going to share the secrets of the trade. Since retiring Phil has educated executives, sales representatives, and trade association members on the art of telling a joke. He will dispel all those common excuses people offer for their inability to tell jokes, teach us to understand and appreciate the three elements found in every joke, and provide us with an inside scoop of his Top Ten Secrets to Successful Joke Telling.

Phil Schulman, *Senior Counsel*, Mayer Brown LLP

5:15 - 9:00 pm

Transportation provided to/from Networking Reception

Sponsored by



5:30 - 8:00 pm

Networking Reception - PuttShack Pittsburgh

Sponsored by



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Wednesday, June 18

7:45 am - 12 pm

3rd Floor

Registration Open

8:00 - 8:50 am

Pennsylvania Ballroom

2nd Floor

Women in Business Breakfast

space is limited

Erica Meyer, *CEO & Publisher*, October Research, LLC
Tara Asquith, *Chief Product Officer*, SoftPro

Sponsored by



8:15 am - 12 pm

3rd Floor

Exhibitor Floor Open

8:15 am - 12 pm

Allegheny III Ballroom

3rd Floor

Networking Pub

Sponsored by



8:15 - 9:00 am

3rd Floor

Networking Breakfast with Exhibitors

Sponsored by



9:00 - 10:00 am

Allegheny II Ballroom

3rd Floor

General Session | Predicting the Market, NAR's Economic Analysis

The National Association of Realtor's Deputy Chief Economist, Jessica Lautz, will discuss key topics such as home sales activity and expectations, mortgage rates, price trends and the impact of migration and job growth. She'll dive into the ever-evolving real estate market, where buyers and sellers are redefining what they want in a home, how they search for properties and the dynamics of their relationship with agents. Demographics are shifting—who is today's housing consumer, and what do they want in their housing transactions?

Jessica Lautz, *Deputy Chief Economist*, National Association of Realtors®

10:00 - 10:20 am

3rd Floor

Networking Break with Exhibitors

Sponsored by



10:20 - 11:10 am

Allegheny II Ballroom

3rd Floor

Latest Fraud Evolution in Real Estate

We'll explore the expanding array of tactics employed by cybercriminals to infiltrate real estate transactions and steal funds, including impersonation fraud, deed theft, wire fraud, notary fraud and more.

Stephen Dougherty, *Asset Recovery Investigator*, Cybera.io

Greg Yeager, *Director, Simplifile Sales and Business Development*, ICE Mortgage Technology

11:10 - 12:00 pm

Allegheny II Ballroom

3rd Floor

Earth Wind and Fire: Retaining Business Continuity Through Disasters

Ensure business continuity with effective risk management and compliance strategies. This session will break down key concepts, exploring the latest technology, operational strategies and regulatory requirements. Learn how to stay compliant, minimize disruptions and build a resilient business that can overcome any challenge.

Jaime Kosofsky, *EVP, Business Development and Compliance, Founding Partner*, Brady & Kosofsky

Brie McDaniel, *Founder and Owner*, Title Insurance Consultants

Kay Underwood-Zach, *Owner*, Title Insurance Consultants

Noon

Allegheny II Ballroom

3rd Floor

Closing Remarks and NS3 Concludes

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