

Subject: MAC Committee – Insurance Compliance

When: June 22, 2018

Committee Chair: Denise Pappu (Wells Fargo)

Attendees (documented – others were present):

- Wells Fargo
- Capital Impact
- VHDA
- Key Bank
- McCracken
- Capital One
- CBRE
- Prudential
- Graystone
- Red Capital
- NCB
- HomeStreet
- Fannie Mae
- Columbia Threadneedle
- Trimontrea
- Columbia National

Agenda

- Review Reporting Needs
 - Compliance Details
 - Waivers Report
 - Loan Requirements
 - Total Deficiency

Meeting Minutes:

- Team would like a new people field for Insurance Person so it can be pulled into reports
 - Allow loan sets to be linked to the field like Asset Management does in Portal
 - PMAST2 has Asset Manager field (05ASSTMGR)
 - Everyone currently using different fields to track this
 - McCracken will need to review how to support those different usages until a new field can be implemented and used
 - All customers want the insurance person field on reports
- Shari to review options for the Compliance notes
 - Maybe have a set sub-note type that the report can use to pull information

- Reports were marked up for additional fields, sort, selection requested by team
- No additional report requests at this time
- Will review if another session is needed prior to MFS conference in October

Next call agenda – TBD

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