

McCracken Advisory Council

NINA NOLLEY, CHAIRPERSON
TJ ARROWSMITH, VICE-CHAIRPERSON
DENISE PAPPU
TERRY CLAY

CHRIS FIELDER
BIREN MAHENDRAN
KENDRA GERMAN

Quarterly Meeting Summary – October 19th, 2020, 12:00 pm ET

Agenda:

- Review McCracken Advisory Council purpose
- Review of 2020
- Announced new MAC Board Chairperson
- Announced new MAC Board representative
- Review of committees and how to get involved in 2021.

McCracken Advisory Council Purpose

Nina Nolley began with a review of the McCracken Advisory Council purpose. She noted that the MAC committee is a national user group that is a way to work with McCracken to ensure that Strategy is a system that works for everyone.

Responsibilities

The primary responsibilities of the Advisory Council are to discuss strategic efforts related to the current and future state of Strategy.

The Advisory Council member responsibilities include (but are not limited to) collaborating by:

- Sharing respective insight
- Performing credible challenge to topics
- Discussing items for escalation
- Roadmap Prioritization



Review of 2020

Nina noted that subcommittee activity for this year was put on hold while everyone dealt with the impact of COVID19, the impending cessation of LIBOR, and the possibility of Negative Index Rates. Subcommittee activity will resume in 2021.

Nina reiterated how helpful she felt that McCracken University had been in providing refresher courses on how Strategy can be used to track and collect on loans in forbearance. She noted that she felt that the McCracken University was an excellent extension of our user conference, providing all customers access to information about how to use Strategy and hopes that the McCracken University sessions will continue in the future.

MAC Announced a new MAC Board Chairperson

Frank McCracken and Denise Ross reminded everyone that Nina Nolley was retiring at the end of the month. They thanked Nina Nolley for her dedication and tireless efforts to keep the McCracken Advisory Council moving forward. She worked with the various MAC Representatives over the years to restructure the group and institute subcommittees to make sure that both Strategy and McCracken continue to meet the needs of all McCracken customers. Nina Nolley announced that Denise Pappu from Wells Fargo would be replacing her as MAC Board Chairperson.

Denise Pappu has been a MAC Board member since 2016. She comes with extensive experience in both the commercial and residential mortgage lending business. Denise began using Strategy in the 1990's and has been instrumental in leading several MAC subcommittees. She is current VP of Tech Business, Senior Systems Associate providing support for Strategy for Wells Fargo Bank. Denise has a Master of Technology, and is a Project Management Professional (PMP).

MAC Announced the addition of a new MAC Board Member

With Nina's retirement, the MAC Board announced the addition of Jason Kamienski from Berkadia as the newest MAC Board member. Jason is Vice President of Data Management for Berkadia Commercial Mortgage Corp.

Advisory Board Members

Company	Type	Environment	Size	Loans	Portfolio	Board Member	Title	Functional Area	Email
National Cooperative Bank (NCB)	Cooperative Bank	Hosted	Medium	3,299	Primary / Master	TJ Arrowsmith	Senior Vice President	Tech	TArrowsmith@ncb.coop
Hudson Advisors	www.hudson-advisors.com/about-hudson/	Hosted	Small	500		Terry Clay	Associate, Servicing & Surveillance	Business	TClay@Hudson-advisors.com
CBRE	Commercial Real Estate Firm	Self Hosted	Large	8,015	Primary / Master	Chris Fielder	Director of Operations & Technology	Business / Tech	Chris.Fielder@CBRE.com
Capital One	Bank	Hosted	Large	5,182	Primary / Master	Kendra German	Senior Director, Agency Finance Servicing	Business	Kendra.German@capitalone.com
Prudential	Life Insurance Co	Hosted	Large	4,568	Primary / Master	Biren Mahendran	Director - Process Management	Business	Biren.Mahendran@pgim.com
Wells	Bank	Hosted	Very Large	61,692	Primary / Master	Denise Pappu	VP, Tech Business Systems Sr Associate	Tech	Denise.R.Pappu@wellsfargo.com
Berkadia	Bank		Medium		Primary / Master	Jason Kamienski	VP of Data Management for Servicing Operations	Business	Jason.Kamienski@berkadia.com

Review of Active MAC Committees

Committees

	Committee Lead	MAC Support
Accounting	Raechel Koh (Wells Fargo)	Biren Mahendran
Borrower Inquiry	Denise Dosh (Columbia)	Denise Pappu
Construction Budget	Carolyn Petersen (Trimont)	Terry Clay
Insurance Compliance	TJ Arrowsmith	
Investor Reporting	Denise Pappu	
Web Portal / API	Terry Clay	
Reserves & Int. Rate Caps	T J Arrowsmith / Kendra German	
Reporting	Biren Mahendran	
Risk Based Capital	Biren Mahendran	
Security & Compliance	Denise Pappu	

Updates will be provided during session on 10/22 @ 3:30 ET / 12:30 PT

MAC Subcommittees are a way for users to provide feedback and input into the requirements to make Strategy work for everyone. The best way to be sure your needs are met is to get involved. If you feel that there is a need for a change or addition to Strategy, feel free to bring the topic up in one of the existing subcommittees or suggest a new committee. The subcommittees are generally headed by a MAC Board Member or a customer representative volunteer with MAC Board support. Each committee focuses on changes or improvements to that area of the system, helping McCracken to prioritize and define the future of Strategy.

In 2019 and 2020, MAC Subcommittees had many changes prioritized in Releases 19B, 19C, and 19D including Bond functionality, extensive changes to GinnieMae reporting, and insurance compliance. Release 2020 coming out in 2021 will continue that trend with more Investor Reporting changes, Insurance Compliance changes and changes prioritized by the Security and Compliance committees.

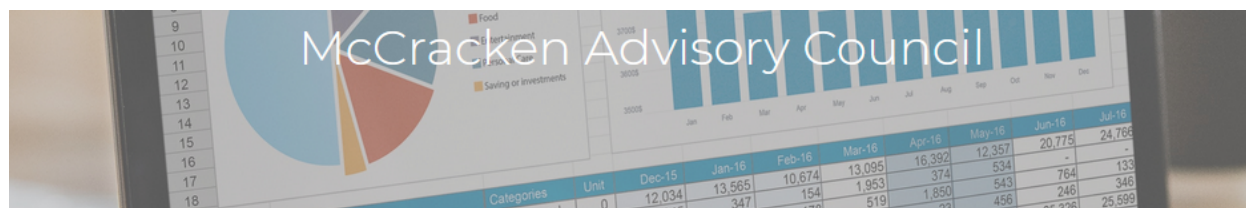
Denise Pappu reminded everyone that there is a conference session on Thursday, October 22nd at 3:30 pm ET to review the sub committees and what they are hoping to accomplish in 2021.

How Can You Help in 2021?

The best way is to get involved in the subcommittees. If you would like to review activity for the subcommittees, visit the McCracken Advisory page of the McCracken website. If you would like to join a subcommittee, send your information to Kim Cooper. Denise reminded everyone that they can reach out to their MAC Representatives at anytime. MAC Director information is available on the McCracken Advisory website.

If you would like to request enhancements to Strategy, Denise Pappu reminded everyone that MAC has developed a form to complete when submitting updates to Strategy. This form outlines the information needed to help with prioritizing the work to be done on Strategy. The form is available for download from the McCracken Roadmap section of the document.

- Go to the McCracken website www.mccrackenfs.com
- Select Support Center from the top of the website. (User name & password required)
- Use the McCracken Advisory Council link from the left hand menu.
- Click the plus sign (+) to expand the McCracken Road Map section.



McCracken Support Center

- > [McCracken University](#)
- > [Videos](#)
- > [Webinar Presentations](#)
- > [Release Materials](#)
- > [Customer Conference](#)
- > [McCracken Advisory Council](#)
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- > [Strategy Help](#)
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McCracken Advisory Council

The McCracken Advisory Council is an active group of McCracken Strategy users working together to provide product direction based on the needs of the user community. This site is provided to share information and keep you abreast of committee activities.

- McCracken Roadmap

The Road Map Committee is tasked with working with McCracken to assist with prioritization, and to provide guidance on the future roadmap for the products, documentation, release implementation, and Customer Conference Input.

- [MAC Enhancement Request Form](#)
- [MAC Enhancement Request Submission Form Instructions](#)

- + R&D
- + Security & Compliance - Denise Pappu
- + Data Dictionary
- + Investor Enhancements - Denise Pappu
- + Strategy APIs - Terry Clay
- + Insurance Compliance - Denise Pappu
- + Strategy Accounting Enhancements
- + Reserve & Interest Rate Cap Enhancements - TJ Arrowsmith & Kendra German
- + Bonds - Denise Pappu
- + Advisory Council - General Activities
- + Portal Enhancements & APIs - Terry Clay

Directors

Denise Pappu – Wells Fargo Bank
Chairperson

denise.r.pappu@wellsfargo.com

TJ Arrowsmith – NCB

Vice Chairperson

tarrowsmith@ncb.coop

Biren Mahendran – PGIM Real Estate

Director

biren.mahendran@pgim.com

Terry Clay – Hudson Advisors

Director

tclay@hudson-advisors.com

Chris Fielder – CBRE

Director

chris.fielder@cbre.com

Kendra German – Capital One

Director

kendra.german@capitalone.com

Jason Kamienski – Berkadia

Director

jason.kamienski@berkadia.com

Open Discussion

Next Meetings:

Next Quarterly Meeting: January, 19th, 2021, 4:00 PM ET

Everyone stay safe and healthy! Thank you all for attending.