

## MAC Sub-Committee Minutes

Sub-Committee:	<b>Escrow</b>	
Date/Time of Meeting:	March 17, 2021; 2:00 PM EST	
Committee Chair:	TJ Arrowsmith, NCB	
MAC Director:	Kendra German, Capital One	
McCracken Representatives:	Joan Sittard	
*Notes Submitted by:	Shari Hartwell-Cook*	
Attendees:		
Name/Company	Name/Company	
Clare Dooley, Berkadia	Carla Hoffman, KeyBank	
Danjo Martino, Berkadia	Penny Edwards, KeyBank	
Donna Matrangelo, Berkadia	Kim Cooper, McCracken*	
Jason Kamienski, Berkadia	Karen Peterpaul, McCracken	
Kim White, Berkadia	Rebecca Hayes, Midland States Bank	
Michael Gerdy, Berkadia	Tori Broussard, Midland States Bank	
William Gou, Berkadia	Dennis Wucher, PGIM	
Melinda DiGiralamo	Hope Rutter, Virginia Housing	
Judy Ledbetter, Capital Impact	Kay Dobson, Virginia Housing	
Gail Shank, Columbia National	Shelly Mallory, Virginia Housing	
Denice Dosh, Columbia Threadneedle	Denise Pappu, Wells Fargo	

### Meeting Minutes:

TJ Arrowsmith welcomed everyone to the committee and introduced Kendra German co-chair of the committee.

TJ reviewed that the purpose of the subcommittee is to offer McCracken direction on system needs as they relate to with Escrow Process including:

- Insurance Compliance
- Reserves
- Taxes
- Escrow Analysis
- Rate Cap Module

TJ noted that the first task of the committee is to review the list of existing Escrow enhancements available on the McCracken website and determine what is still needed and assign a priority to items. New list to be posted with columns to indicate if it is still needed, and assign a priority 1-3 where 1 is the highest priority.

Committee will then take the highest priorities and work toward getting McCracken requirements to move forward with the requested enhancements.

The Directors asked that each company review the [Escrow Subcommittee Changes and Enhancements Listing](#) on the website and indicate if the request is still needed? For those still needed, assign a priority of

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1-3 where 1 is the highest priority. When complete [email the lists to Kendra and TJ](#) prior to the May 19<sup>th</sup> meeting so that discussions can begin on requirements on the highest priorities.

TJ asked McCracken to describe what McCracken needs from the Customers when requesting an enhancement to the system:

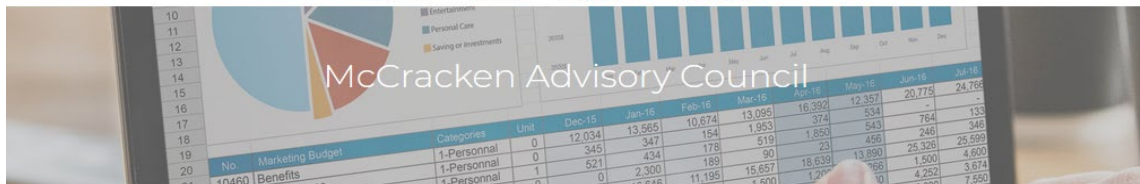
McCracken requests that you be descriptive as possible when it comes to the purpose of the enhancement. The description does not necessarily have to be technical, but it should describe what the change you are looking for entails. What are the business requirements? What will the benefit be? Is there required output? From there we can work with you to get to the technical details.

TJ asked the group if they had any new escrow related topics that they would like to discuss, that was not part of the prioritization list.

Documents and meeting summaries are available on the McCracken website under Support Center, McCracken Advisory Council. Work in Process Listing is also on the McCracken Advisory Council page if you want to review what we McCracken is working on and if something is slotted for an upcoming release. Customers are encouraged to see their system administrators for instructions on how to register for Support Center if they do not have access.



PRODUCTS SERVICES CONTACT US OUR COMPANY



### McCracken Support Center

- McCracken University
  - Videos
  - Webinar Presentations
  - Release Materials
  - Customer Conference
  - McCracken Advisory Council**
  - Documents
  - Forum
  - Strategy Help
  - My Email Preferences

### 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.

Work in Process - As of March 12, 2021  
MAC Enhancement Request Submission Form  
MAC Enhancement Request Submission Form Instructions

- Quarterly Meeting Summaries
- General / Investor Reporting Subcommittee
- Web Subcommittee
- Transactional Subcommittee
- Escrow Subcommittee
  - This committee will discuss enhancements and changes related to anything escrow including Reserve Enhancements, Interest Rate Caps, and Insurance compliance as well as enhancements to tax and insurance disbursements and Outside Tax Processing. This committee will meet on the third Wednesday of every other month at 2:00 pm ET.
  - Insurance Compliance
  - Reserve & Interest Rate Cap Enhancements
  - Escrow Subcommittee Minutes and Documents

### Directors

Denise Pappu – Wells Fargo Bank  
Chairperson  
[denise.r.pappu@wellsfargo.com](mailto:denise.r.pappu@wellsfargo.com)

TJ Arrowsmith – NCB  
Vice Chairperson  
[tarrowsmith@ncb.coop](mailto:tarrowsmith@ncb.coop)

Biren Mahendran – PGIM Real Estate  
Director  
[biren.mahendran@pgim.com](mailto:biren.mahendran@pgim.com)

Terry Clay – Goldersun, LLC  
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[terryclay\\_98@yahoo.com](mailto:terryclay_98@yahoo.com)

Chris Fielder – CBRE  
Director  
[chris.fielder@cbre.com](mailto:chris.fielder@cbre.com)

Kendra German – Capital One  
Director  
[kendra.german@capitalone.com](mailto:kendra.german@capitalone.com)

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### Follow-Up

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Customers:

Review Changes and Enhancement listing and return to [Kendra.German@capitalone.com](mailto:Kendra.German@capitalone.com) and [tarrowsmith@ncb.coop](mailto:tarrowsmith@ncb.coop) prior to May 19<sup>th</sup> meeting.

McCracken:

Reposting Changes and Enhancement listing with additional columns.