

MBA's National
Mortgage Servicing
Conference and Expo
2007

Managing and Rating Your Vendors

Panelists

- **Raymond Barbone** – Group Sr. VP ABN AMRO Mortgage Group Inc.
- **Holly Carter** – Asst. VP/Mgr of Vendor Relationships and Business Continuity for Home Loan Services, Inc.
- **Ralph Gerardi** – VP Chase Home Finance, LLC
- **Jim Rodgers** – VP EverHome Mortgage Co.
- **Laura Rodin** – VP Chase Home Finance, LLC

Topics

- Contract Negotiations & Management
- Data Integration & Business Continuity
 - Challenges of Vendor Management
 - Leveraging Vendor Relationships
 - Reg AB

Contract Negotiations & Management

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“Will you come play in my Sandbox?”

- Build a Team
 - Vendor
 - Legal
 - Business
 - Risk
- Performance Monitoring

Data Integration & Business Continuity

Data

Integration & Business Continuity

- Electronic Data Transfers
- Corporate IT Review
- Gramm-Leach-Bliley Act
- Savings vs. Risk
- Disaster Recovery Plan Reviews

Challenges of Vendor Management

Challenges of

Vendor Management

- Reduce Cost & Maintain Quality
- Standardization vs. Special Servicing
- Control/Reduce Delinquency Without Increasing Staff
- Satisfy Investors & Insurers

Leveraging Vendor Relationships

Leveraging Vendor Relationships

- Service View
 - When do you use one vendor vs. multiple vendors?
 - What is the vendor's capacity?
 - What is the vendor's financial stability?
- Vendor View
 - When should you request additional business?
 - How do you maintain quality standards when introducing new products?

REG AB

REG AB

Section 229.122d(1)ii states that if any material servicing activities are outsourced to third parties, policies and procedures must be instituted to monitor their performance and compliance with such servicing activities.

REG AB

- Utilize a variety of tools to monitor vendors
 - Service levels specified in agreements
 - Portfolio performance reports
 - Attorney performance reports
 - Bi-weekly issue and performance meetings

Questions?