

# Fidelity Attorney Roundtable

## Meeting Notes

The Fidelity Attorney Roundtable held a teleconference on **Monday, November 26, 2007 at 1:00 PM EST**. The attorney members of the Roundtable include the following firms:

**Barrett Burke Wilson Castle Daffin & Frappier [TX]**  
**Bierman, Geesing & Ward [DC, MD, VA] – AFN Designated**  
**Castle Meinhold & Stawiarski [CO] – USFN Designated**  
**Fein Such Law Group [NJ]**  
**Hughes Watters & Askanase [TX]**  
**McCabe Weisberg & Conway [NY, NJ, PA]**  
**McCarthy & Holthus [CA]**  
**Shapiro & Sutherland [OR]**

**The next meeting will be held via teleconference on December 17th at 1:00 PM EST.** If you have any comments or items of concern you would like added to the agenda for discussion, please contact any member of the Attorney Roundtable who you are comfortable reaching out to, or contact FIS Attorney Relations at [AttyFeedback@FNFS.net](mailto:AttyFeedback@FNFS.net).

**Attorney Roundtable Meeting  
Monday, November 26, 2007  
1:00 PM ET / 12:00 PM CT**

**TOPICS OF DISCUSSION**

**1) Title Claim Process-** Review of forms and issues/holds required.

**(Submitted by Dave Owen)**

**REQUEST:** "I would like to suggest a discussion of the title claim process. It has come to my attention that the same information relating to title issues must be input in 4 different areas of Process Management. There are 2 forms and 2 issues that we are required to provide the same information.

Forms = Additional fee request & Title work sheet

Issues = Additional fee request & title resolution

Seems like there should be a more efficient way to accomplish what is needed." - Dave Owen

**FIS RESPONSE:**

Chris Anderson stated that the clients like to have 1 form for familiarity and Dave asked for Chris to send him the documentation for this.

**DISCUSSION:**

- Dave asked if it is necessary to have to fill out both pieces of information, since the same data is being input into both.
- Chris said that the firms need to only put a brief summary in the issue, while the form needs to have more details. Chris said that there is a purpose to having both.

**2) APR Quarterly Incentive Program Change**

**FIS RESPONSE:**

Matt Rogina let the Roundtable know that an announcement regarding these changes will go out soon to the Network firms. The changes will go into effect 1/2008.

**STATUS UPDATES**

**1) FNMA Title Directive**

**(Bill Newland)**

Bill Newland and Scott to further review and consider scoring from "Title Received-To-First Action."

**FIS RESPONSE:**

Bill Newland stated that currently there are no plans to make changes to the APR in regards to "Title Received to First Action."

**DISCUSSION:**

- Caren Castle stated that the recent FNMA change does not affect all OH firms across the board, only those firms who received a letter from FNMA, and this was not picked by region or servicer.
- Caren thinks that this will give some OH firms an unfair advantage, since they will not have to follow the same guidelines as those firms who did not receive the notice.
- Bill Newland stated that he is not clear on how FNMA is able to do this randomly in OH.
- Caren said that she is going to hold a call with FNMA about this and will get back to Bill and Scott on the outcome of her call.

## 2) APR Project List

Priority Item	Description	Projected ETA *
BK APR – MFR Received to Results	As a result of the MFR stage changes the weighting will be modified on the BK scorecard	1/2008
Change Initial Stage Measurement to "File Referred"	Change all stages that currently hinge off of "File Received" to start with "File Referred" in both FC/BK	1/2008
Illustration of Ch7 and Ch13 distribution in State Attorney Section	Illustrate distribution of Chapter 7 and Chapter 13 volume in State Attorney Section	1/2008
Upstate/Downstate New York	Separate Upstate and Downstate counties in NY for APR purposes (by zip codes)	This will be implemented after the 1/2008 changes
Inherited Files Stage Update	Stage completions and activities in the APR when the activity of both the starting/ending events of the stage occurs after the date of transfer	1/2008

### 3) Missing Documents/ Information

(Carrie Ward)

Carrie Ward will reach out to AFN members to get a state by state matrix of documents that are required for a 1<sup>st</sup> action for the AFN.

#### RESPONSE:

Carrie Ward is working on this project, and is awaiting responses from two more states.

### 4) Issues – Close Reasons

(Bill Newland)

FIS will audit closed Issues and compile a list of appropriate close responses. This list will be sent to the roundtable once completed.

#### FIS RESPONSE:

Bill Newland said that he and Lindsey Lesch went over multiple closed issues as far back as October 2007 and they did not find any issues that were closed improperly. Going forward, if a firm comes across an issue that is closed without a specific close reason, they need to send it to either Bill or Michael Cloin for review.

### 5) Stop/Hold Reasons

(Michael Cloin)

Michael Cloin will check with FIS clients to see what they think about the addition of Sale instructions into the Stop/Hold module he is working on.

#### FIS RESPONSE:

Michael Cloin said that FIS is working with the Development team on making initial changes and also working with our clients on standardizing the close reasons that are available. Michael is hoping that by the time the December Roundtable meeting comes around, he will have a list of the standardized close reasons that will show in the drop-down. Once all of this is done, FIS will consider making the change regarding the "Sale Instructions" after the next Desktop rollout, tentatively scheduled for Q1 2008.

### 6) Financial Breakdowns/bidding

(Michael Cloin)

Michael Cloin will review whether or not amounts given for 'other fees/costs' or 'expenses' given on RI/PO quotes could automatically come over with a breakdown.

#### FIS RESPONSE:

Michael Cloin stated that at this time, there is no good technical solution for this issue. However, FIS will continue to search for a work-around, as the Bidding process is being pulled into Process Management in 2008.

## OPEN DISCUSSION

- Kelly Sutherland stated that the Holiday Moratorium Network Updates come about 60 days after they have already set sales. Asked what his firm should do for those sales that have already been set. Chuck Martisek advised that if a sale has already been set, the firm can use the "Client/Investor Directed Delay." Regardless of the hold, if a sale has been set and the client has sent a moratorium, unless otherwise specified, the firm has to postpone sales. Bill asked how long it would take to get another sale date and the reply was that in some states, it could take 3 months. Bill, Matt and Chuck all stated that next year, we will try to have all the Moratorium updates done and out to the firms around September.
- Matt Rogina asked the firms if everyone will be attending the MBA Conference in New Orleans in February and everyone said they were planning on it. Matt suggested that this Conference be the next opportunity for the face-to-face Roundtable meeting that month. Everyone agreed.
- Kelly Sutherland inquired if document delays for clients that are outside the normal amount of time will receive a 100% carve-out. Bill Newland stated that at this time, FIS is not giving any credit for document delays, no matter who the client is. However, Bill stated that he is aware of the difficulties firms are having with document delays and APR scores, and is in discussion with Scott Barnes about holds. Also, Bill reminded the Roundtable that Carrie Ward and Caren Castle are getting together lists of documents that are needed for first action in each state. Once these lists are put together, they will be presented to the clients. The main reason and concern for why FIS is not giving hold credit for document delays is because if we gave credit, the firms would have no incentive to push for the documents that they need and Caren Castle agreed.
- Chuck Martisek asked the firms what they thought about the cases that have been dismissed in OH due to firms not being able to produce the original assignments. None of the firms said that they have heard much about the topic and Caren said that the USFN has discussed this, but not in much detail since the last time they had their meeting, the ruling from the OH judge had not yet come down. Bill said that if any of the firms hear anything about this to please advise not only FIS but also our clients.
- Congratulations to Caren Castle on being named USFN member of the year.
- Bill said thank you not only to Caren but to all of the firms. He stated that although we always strive for a better partnership, we are making changes for 2008 that will help the Attorney Management team work better with the firms and help the firms become as efficient as possible. Bill also stated that we always appreciate the firms' feedback and to make sure to let us know if there is anything that can be changed or improved. Kevin McCarthy stated that the firms also appreciate our help, especially dealing with the NTIEE issues his firm has been having. Kevin said that Sonny Thomas and his team really jumped on the problem and resolved it.
- Matt stated that the end of the term for ½ of the Roundtable firms is coming up (December is the last month for them), so Attorney Relations will put together a list of those firms who have asked to participate on the Roundtable and get it to Upper Management.

## DELIVERABLES

<b>Item Description</b>	<b>Active Tasks</b>	<b>Tasks Assigned to</b>
<b>APR Project List – Top 5 Priority</b>	FNFS will provide updated guides and explanations for APR changes to the roundtable to review and create a network announcement prior to the go-live for these changes.	Chris Hymer Lindsey Lesch
<b>Missing Documents/ Information</b>	Carrie Ward will reach out to AFN members to get a state by state matrix of documents that are required for a 1 <sup>st</sup> action for the AFN.	Carrie Ward
<b>Stop/Hold Reasons</b>	Michael Cloin will work to establish a list of the standardized close reasons that will show in the drop-down.	Michael Cloin
<b>Attorney Roundtable 2008 Selections</b>	Attorney Relations will put together a list of those firms who have asked to participate on the Roundtable and get it to Upper Management for them to make final selections.	Lindsey Lesch