



35th Annual Conference  
April 19-21, 2023 ~ Philadelphia, PA  
Kimpton Hotel Palomar



Conference Materials



ATIM

**35<sup>th</sup> Annual Conference**

**Kimpton Hotel Palomar**

**April 19-21, 2023 ~ Philadelphia, PA**

## ATIM Conference Agenda

*All meetings will take place in the Burnham Ballroom 25<sup>th</sup> Floor*

### Wednesday, April 19, 2023

3:00-4:30 pm	Registration Desk open - <i>Burnham Foyer 25<sup>th</sup> Floor</i>
4:30-6:30 pm	<b>Ice-breaker Reception</b> (Open bar w/ Slider station) - <i>Burnham Ballroom 25<sup>th</sup> Floor</i>

### Thursday, April 20, 2023

8:00-9:00 am	<b>Full Breakfast Buffet</b> - <i>Cret and Abele Ballrooms 24<sup>th</sup> Floor</i> Registration Desk open - <i>Burnham Foyer 25<sup>th</sup> Floor</i>
9:00 am	<b>Welcome to ATIM and Philadelphia</b> <i>Andrew Acker - D. Bello</i>
9:15 am	<b>Keynote: The Changing Ways Title Agents Obtain Information</b> <i>Craig Haskins - Chief Operating Officer, Knight Barry Title</i>
10:15 am	<b>Break</b> - <i>Burnham Foyer 25<sup>th</sup> Floor</i>
10:30 am	<b>Deed Fraud Prevention in Philadelphia</b> <i>Panelist: James P. Leonard, Esq. - Commissioner of Records, City of Philadelphia Department of Records</i>

Thursday, April 20, 2023 continued...

- |              |   |
|--------------|---|
| 11:30 am     | <b>The Domino Effect: What to do When Well-Intentioned Affordable Housing Initiatives Result in Unintended Consequences and Potential Consumer Harm</b><br><i>Panelist: Karen Koogler - The Koogler Group</i>   |
| 12:30 pm     | <b>Lunch Buffet “Southern Comfort” - Cret and Abele Ballrooms 24<sup>th</sup> Floor</b>   |
| 1:45 pm      | <b>Who Wins in Title Production? In-house vs. Outsourcing vs. AI</b><br><i>Panelist: Jeffrey Bates - Chief Executive Officer, D. Bello</i><br><i>Panelist: Matt Younkle - Co-founder &amp; CEO, Pythonic Corporation</i>  |
| 2:45 pm      | <b>Down the Rabbit Hole: Exploring the Future... Where Everything OLD is NEW Again</b><br><i>Panelist: Karen Koogler - The Koogler Group</i>  |
| 3:45 pm      | <b>Break - Burnham Foyer 25<sup>th</sup> Floor</b>  |
| 4:00 pm      | <b>Keynote: Economic Perspectives &amp; The Real Estate Market. Where Do We Go from Here?</b><br><i>Patrick Stone - Executive Chairman &amp; Founder, Williston Financial Group</i><br>Patrick Stone returns in a pre-recorded video to share his candid and thought-provoking insights into the key issues impacting the Real Estate and Title Insurance industries. Patrick will inform us on current trends in real estate technology, provide forecasts on the economy, and help connect the dots between these macro issues. |
| 5:00-6:00 pm | <b>Wind Down Happy Hour - Hotel Lobby</b>   |

### Friday, April 21, 2023

- |              |   |
|--------------|---|
| 8:00-9:00 am | <b>Full Breakfast Buffet “Adventure” - Burnham Ballroom 25<sup>th</sup> Floor</b><br>Registration Desk open - Burnham Foyer 25 <sup>th</sup> Floor  |
| 9:00 am      | <b>Connecting New Tech and Title Production: What Should We Expect and What Works?</b><br><i>Panelist: Nathan Schrauben - Chief Technology Officer, Amrock</i><br><i>Panelist: David Burner - Director of Business Development &amp; Partnerships, Grid151</i><br><i>Panelist: Michael Williams - Principal Technologist, Limelyte Technology Group</i> |

*Friday, April 21, 2023 continued...*

- |          |   |
|----------|---|
| 10:00 am | <b>Break</b> - Burnham Foyer 25 <sup>th</sup> Floor   |
| 10:15 am | <p><b>Keynote: A Look Under the Hood of What's Happening in Title: from Legislation, Acquisitions, Industry Regulations, and Changing Trends</b></p> <p><i>Eugene Urcan - CEO, Meadowlark Title, LLC</i></p> <p><i>Jonathan T. "JT" Wu - Vice President, Corporate Development, Meadowlark Title, LLC</i></p> |
| 11:15 am | <p><b>Conference Recap and Conclusion</b></p> <p>In the ATIM tradition, the conference will wrap up with a free form discussion open to any topic important to you.</p>   |
| 11:30 am | <b>Conference Concludes</b>   |
| 12:00 pm | <p><b>Optional Social Event: Hilariously Historic Trolley Tours</b></p> <p>(Separate Registration Required)</p> <p>Meet in Lobby at 12 Noon. The bus will leave at 12:15 pm.</p> <p>An entertaining, comedic story-telling adventure through Philadelphia, covering the city's major attractions.</p>         |

The ATIM Board would like to thank everyone for attending. Without you, this wouldn't be possible.

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**Andrew Acker**  
D. Bello

Andrew Acker is the Chief Operating Officer of D. Bello, a company that has been around as long as he's been alive (D. Bello was founded in 1988, so let the guessing games begin!) As COO, Acker focuses on ways to leverage technology and productivity with D. Bello's Title Production Workforce™ to efficiently solve the business challenges of title companies.

A creative problem solver who thrives on getting things done, Acker is passionate about helping equip leaders and businesses with the tools, skills, and systems necessary to allow them to scale and succeed. After becoming COO in 2012, Acker worked with CEO Jeffrey Bates to accelerate efforts in reinventing outsourced title production. His expertise paved the way for a broader strategic vision as the company worked to expand its services and new product development.

In addition to his contributions to D. Bello, Acker lends his voice to the land title industry through regular speaking engagements at various conferences for the American Land Title Association (ALTA). He also serves as president of the Association for Title Information Management (ATIM), a non-profit organization focused on the industry's utilization and future direction of data and technology.

Originally from Rancho Cucamonga, California, Acker now resides in Irvine with his wife and three children. His love for his family is rivaled only by his passion for coffee and golf. When not in the office, you can find him somewhere warm, enjoying his time with them, playing 18 holes, or sipping a well-brewed caffeinated beverage. Acker is also a devoted Major League Baseball fan pursuing a lifelong goal of attending a game at every MLB stadium in the country. He is currently edging out CEO Jeffrey Bates by one in this quest, though he has committed to bringing up this fact only once a day moving forward.

**Jeffrey Bates**  
D. Bello

Jeffrey Bates is the Chief Executive Officer of D. Bello, a leading remote workforce solution partner in the real estate title space. Bates leads and manages the company's overall operations as it seeks to free up title professionals to become more efficient and successful through its intentional outsourcing model.

Since becoming CEO in 2013, Bates has spearheaded the expansion of D. Bello's service offerings while also designing and building state-of-the-art offshore infrastructure. His leadership helped D. Bello achieve its largest year of growth ever in 2021, including recognition as one of Inc. Magazine's 5,000 fastest-growing small businesses in California.

Alongside his role at D. Bello, Bates also serves on the Government Affairs Committee (GAC) and as vice chair of the Title Insurance Political Action Committee (TIPAC) for the American Land Title Association (ALTA), the nationwide trade association of the land title industry.

A self-described LA/OC hybrid, Bates was born in Los Angeles, grew up in the LA suburb of Whittier, and now calls South Orange County home with his wife, Sara, and their three children. He values his time serving Mariners Church Mission Viejo, where he helps to mentor junior high and high school students. An avid baseball fan, Bates has attended a game at 22 of the 30 Major League Baseball stadiums, setting a goal to complete the remaining eight soon. He's edged out by COO Andrew Acker,

*Conference Bios continued: Jeffrey Bates...*

who has attended games at 23, but assures everyone that this is the source of absolutely no bitterness or awkward relational tension between the two.

**David Burner**  
Grid151

David Burner is the Director of Business Development & Partnerships at Grid151, which powers and connects the real estate, mortgage and title insurance industry. He's responsible for the development & growth of Grid151's client base with a focus on enterprise-wide integration strategies, partnership opportunities, and marketplace expansion. Prior to joining the company, he was with Orchard, a tech-forward real estate brokerage, leading activation for a new direct referral channel for mortgage lenders that strengthened borrower's offers with specialty finance solutions, and strategy and partnership roles at Notarize where he helped drive the company's growth agenda, resulting in 3,000% growth over 3 years and a \$130 million Series D capital raise.

**Craig Haskins**  
Chief Operating Officer  
Knight Barry Title

Craig's initial areas of expertise focused on title insurance and complicated closings but now he spends most of his time growing Knight Barry Title via acquisition and organic growth. Currently he oversees all 80+ offices and 500 employees in five states - Wisconsin, Minnesota, Michigan, Florida and Texas.

Craig is also quite a title nerd. In his 25 years in the title business, he has served as the President of the Wisconsin Land Title Association and is a current member of the ALTA Board of Governors.

Craig received his Bachelor's degree from the University of Florida (Go Gators). Then he went on to earn an MBA from Marquette University in Milwaukee. He spends all summer mowing straight lines in his lawn at least twice per week and recently took up smoking meat on his two smokers after a recent expansion in Texas.

**Karen Koogler**  
The Koogler Group

As author of 31 industry textbooks - spanning federal compliance, risk management, industry pre-licensing, future-focus business books, and job-skills training - Karen continues to lead the charge for meaningful industry education. Since 2010, she has focused her research on the industry-impact of CFPB initiatives, e-Closings, RON legislation, Cybersecurity, Blockchain technology, and more. Currently, Karen is laser-focused on the 'unintended consequences' of well-intentioned Affordable Housing Initiatives that, left untended, will result in long-term Consumer harm, and have a devastating effect on both the Appraisal and Title (Settlement) Industries. Her current book, The Domino Effect is scheduled to be released in Fall 2023.

**James P. Leonard, Esquire**  
Commissioner of Records  
City of Philadelphia Department of Records

Jim Leonard is a lifelong resident of Philadelphia, who has spent almost his entire career in public service on behalf of the City of Philadelphia.

He has served as the Commissioner of the City of Philadelphia Department of Records since 2016, when he was appointed by Mayor Jim Kenney. As Commissioner, Jim serves as the Recorder of Deeds for Philadelphia, manages the City's records management program for all departments, administers the Department's public access to records program, including the City's historical archives, and oversees the City's printing and binding center and official City photographer.

Prior to being appointed Commissioner, Jim practiced law in Pennsylvania for approximately 17 years, with a focus on real estate transactional law, municipal pension matters, and the PA Right-to-Know Law. He practiced primarily at the City of Philadelphia Law Department.

Mr. Leonard received his law degree in 1999 from Villanova University School of Law. He received his Bachelor of Arts Degree in History from Villanova University in 1996.

**Nathan Schrauben**  
Amrock

As Amrock's Chief Technology Officer, Nathan Schrauben oversees our Technology team's mission to build industry-leading, scalable solutions that elevate the client experience. A proud Western Michigan University alum, Nathan has been in the mortgage industry since 2002. In 2012, he joined Rocket Mortgage as their Director of Special Loans and Insurance. Nathan proceeded to gain a wide range of leadership experience across both operations and technology business areas. Most recently, Nathan led Rocket Pro TPO's Technology team as Senior Vice President of Software Engineering.

In his free time, Nathan loves spending time with his wife, two daughters and their dog. If he's not at home, you can catch him at the nearest course playing a round of golf.

**Patrick F. Stone**  
Chairman & Founder, Williston Financial Group

Pat has enjoyed a lengthy career in real estate and real estate related services. He has held "C" officer positions with three public companies and served as director on two Fortune 500 Boards. The senior executive management positions included nine years as President and COO of the nation's largest title insurance company, Chairman and Co-CEO of a software company and CEO of a real estate data and information company.

Pat currently serves as Chairman and Founder of Williston Financial Group, as well as on the boards of: Nassau Reinsurance, Transmodus and Trysting Tree Golf Club. Other accolades include: Housing Wire's coveted Vanguard Award in 2019 and 2021, Progress in Lending's "Lending Luminary Award" in 2019 and 2020, October Research's annual "Leadership Award" in 2020 and Inman News "100 Most Influential People in Real Estate" in 2013, and in 2015 and 2021 as one of the "Top 101 Real Estate Industry Doers."



*Conference Bios continued: **Patrick Stone**...*

Pat has also served as Vice-Chairman of Metrocities Mortgage, a 2005 top twenty mortgage lender, and as Chairman of The Stone Group, an Austin, Texas based tenant-rep brokerage company. As well as on the boards of Fidelity National Financial, First American Corporation, FNIS, MicroGeneral, SKLD, World Minerals, Green Street Advisors, DigitalMap, Homegain, RedVision, Wystein Capital and Inman News.

His philanthropic involvement has included service as Chairman of the Santa Barbara Art Museum and as a Director of the Portland Art Museum. He is a past chairman of the Oregon State University Foundation, and Co-Chair of its Billion Dollar Capital Campaign.

Patrick has three daughters, five grandchildren and resides in Portland, Oregon with his wife Vicki.

**Eugene Urcan**  
Meadowlark Title, LLC

Eugene Urcan co-founded Meadowlark in 2021. Mr. Urcan has originated, supervised, and sold numerous companies in the title insurance sector. Prior to founding Meadowlark Title, Mr. Urcan was the Founder & Managing Partner at Urcan & Co., LLC. Mr. Urcan has been a regularly featured guest and contributor to leading financial media outlets, including CNBC, Reuters, Bloomberg, and Fox Business.

Mr. Urcan holds a Master's degree in Public Policy from the University of California, Los Angeles (UCLA). He also received a B.A. in Biology from California State University, Northridge, where he was a collegiate volleyball player.

**Michael Williams**  
Limelyte Technology Group

Michael Williams has spent the last decade as the Principal Technologist at Limelyte Technology Group, a software consulting firm specializing in solutions for the title industry and the premiere development partner for Property Sync.

Michael is an atypical software developer who is a proficient coder and business management resource, providing a holistic approach that drives software growth to scale. Michael's prowess surrounds automation, system migrations, cloud infrastructure, and bridging gaps between systems (middleware). Michael is active in his local business community, serving on the board of Spokane Professionals Society and an organizing member of Spokane's foremost startup accelerator, Sparks Weekend.

Michael is a husband and father of two boys; he welcomed his youngest son to the world just last March. Michael embraces the Pacific Northwest lifestyle, snowboarding in the winter and spending days on the region's numerous lakes and golf courses in the summer. Michael is currently training for his first half marathon in Missoula this June



**Jonathan T. “JT” Wu**  
Meadowlark Title, LLC

Jonathan “JT” Wu joined Meadowlark in 2022, bringing extensive corporate development, strategic finance, and mergers & acquisition experience to bear from across a variety of industries. Prior to joining Meadowlark Title, Mr. Wu led the Acquisitions and Strategic Policy team at National Spine & Pain Centers, following private and public sector experiences at Citigroup and the U.S. State Department.

Mr. Wu received an A.B. cum laude in Public and International Affairs from Princeton University, where he was a varsity coxswain on the heavyweight rowing team.

**Matt Younkle**  
Pythonic Corporation

Matt is the co-founder and CEO of Pythonic Corporation. Pythonic develops machine learning technologies that read and process title and escrow documents, enabling the automation of labor-intensive steps common to most real estate transactions.

Prior to Pythonic, Matt served on the board of Adeptive Software, developer of Resware, until its acquisition by Qualia in December 2020. An engineer at heart, he invented the TurboTap, a device used in pubs and stadiums worldwide that poured draft beer faster with less waste. Before TurboTap, he helped pioneer streaming audio and video on the web at Vosaic. While a college student, he developed technology that grew the first food in space aboard the Space Shuttle Columbia.

Matt received product-of-the-year honors from Popular Science and TIME Magazine. He has degrees in Electrical Engineering and Computer Science from the University of Wisconsin and is a recipient of the University's Entrepreneurial Achievement Award. Matt lives in Madison, WI, with his wife, Susie, and their two children.

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# Cash Prize Giveaway



- ★ To encourage everyone to be **on time and in their seats**, we will have random drawings for cash prizes throughout the conference.
- ★ All conference attendees are entered for a chance to win an ATIM cash prize giveaway!
- ★ You **must be present** to win.