



## Notice Regarding Changes in the Course Provider Working Group 04/1/2024

### Purpose

The purpose of this notice is to inform NMLS approved course providers of the member shop changes in the Course Provider Working Group effective April 1, 2024.

### Background and Working Group Details

The State Regulatory Registry (SRR), the operator of the Nationwide Mortgage Licensing System (NMLS), formed a standing Course Providers Working Group (CPWG) in April 2015. The CPWG was most recently re-approved by the SRR Board of Managers March 2019. The purpose of the CPWG is to provide relevant input on matters pertaining to course approval and course delivery policies for education that NMLS approves as required by the SAFE Act. Course provider input will ensure that, to the greatest extent possible, SRR takes into consideration course provider's concerns when formulating policies or other requirements that impact the industry and course provider community.

A primary role of the CPWG is to consider and make recommendations on behalf of the entire course provider community. As such, SRR has established a working group of nine (9) members comprised of a mix of large national providers, small independent companies, and schools that offer classroom, online, webinar, or a mix of course formats. The CPWG mission statement, responsibilities, and membership criteria are enclosed.

### Members of the Course Provider Working Group

Effective April 1, 2024, the CPWG is comprised of the following individuals:

- **David Hennon** - America's Mortgage Trainers
- **Sarah Little** - OnlineEd
- **Shirley Allen** - Affinity Real Estate & Mortgage Services
- **Angela Craig** - OCL Financial Services LLC DBA OnCourse Learning
- **Elaine Jackson** - Ameritrain Mortgage Institute
- **Peter Citera**, Real Estate Institute
- **Kristina Talkington**, My Mortgage Trainer
- **Andrew Lesce**, Advanced Creative Learning School of Real Estate LLC
- **Jon Wallace**, Mortgage Educators and Compliance

Questions or information about the working group may be directed to Jessica Esquina, Director, Mortgage Education ([jesquina@csbs.org](mailto:jesquina@csbs.org)).



## **NMLS Course Provider Working Group (CPWG)**

### **Mission**

The purpose of the Course Provider Working Group (CPWG) is to provide relevant input on matters pertaining to course approval and course delivery policies for education that NMLS approves as required by the SAFE Act. Course provider input will ensure that, to the greatest extent possible, NMLS takes into consideration course provider's concerns when formulating policies or other requirements that impact the industry and course provider community.

### **Responsibilities**

The CPWG has the following responsibilities:

- As requested, provide input on proposed policies that may impact the operations of course providers or industry.
- As requested, provide input on proposed policies that may impact the delivery of education to the industry.
- As requested, provide input to NMLS staff on proposed changes to the Functional Specification for all Approved Courses.
- To the greatest extent possible, represent not only the views of their company, but the views of other course providers.
- Attend one 1 hour working meeting per month with occasional "homework."
- Serve as testers for User Acceptance Testing for enhancement to the Education Management System (EMS).

### **Membership**

- Volunteers will be requested from the community of approved course provider by NMLS.
- Membership commitment is 2 year term.
- Members will keep all information discussed in the working group confidential.
- Members will keep all communications distributed by NMLS or representatives of NMLS in conjunction with CPWG meetings strictly confidential and are not to forward, distribute, or discuss the content of any communications with individuals who are not members of the CPWG.
- Violations of this policy constitute grounds for immediate removal from CPWG membership.
- CPWG is intended to be comprised of representatives with experience in working with NMLS.
- Membership is limited to nine (9) members comprised of organizations of various size, varied course delivery formats, and from across different regions of the country.
- CPWG members from a company must be consistent from month-to-month. Occasional substitutions are allowed, but no member other than the official CPWG member may participate in any meeting or call without prior approval from NMLS staff.
- SRR staff will periodically review CPWG membership and makes changes to ensure broad representation and to provide opportunities for input from different companies and may make any changes as needed to ensure the mission of the CPWG is maintained.