



**BRIAN J. TAULBEE**  
*Counsel*

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Brian focuses on state and federal regulatory and compliance matters related to the mortgage industry. He advises financial institutions, mortgage companies and mortgage brokers on the requirements of HUD, Fannie Mae, Freddie Mac, Ginnie Mae, the Real Estate Settlement Procedures Act (RESPA), and the Truth-in-Lending Act (TILA). Brian conducts fair lending audits and assists clients with issues related to state regulatory approvals and licensing requirements, as well as compensation and payment requirements.

Brian also advises on issues impacting the appraisal industry, with a particular focus on appraisal management companies. Additionally, Brian provides corporate and transactional services, including contract drafting and negotiation.

### **PRACTICE AREAS**

- Licensing & Approvals
- Regulatory Compliance
  - Federal Regulatory Compliance
  - State Regulatory Compliance
- Transactional and Corporate

### **EDUCATION**

- Harvard Law School, J.D., 2004
- University of Michigan, B.A., 2001

### **ADMISSIONS**

- District of Columbia
- Florida

### **REPRESENTATIVE MATTERS**

- Conduct fair lending audits to ensure potential disparate treatment issues are addressed
- Assist various lenders, servicers and settlement service providers with federal and state regulatory investigations, including defending and settling civil disciplinary enforcement actions
- Assist Appraisal Management Companies in complying with federal and state regulatory requirements and with issues before state regulatory boards
- Analyze mortgage documents for compliance with state contract, mortgage and notarial

requirements

- Draft and negotiate complex loan and servicing sale documents and corporate merger documents

## **PUBLICATIONS**

- Co-author, *Ability to Repay (ATR) and Qualified Mortgage (QM) Resource Guide*, MBA Compliance Essentials (MBA 2019)
- Chapter contributor, *Real Estate and Mortgage Banking: A New Era of Regulatory Reform* (Thomson Reuters 2017-2018)

## **AFFILIATIONS**

- American Bar Association
- Florida State Bar Association
- Mortgage Bankers Association