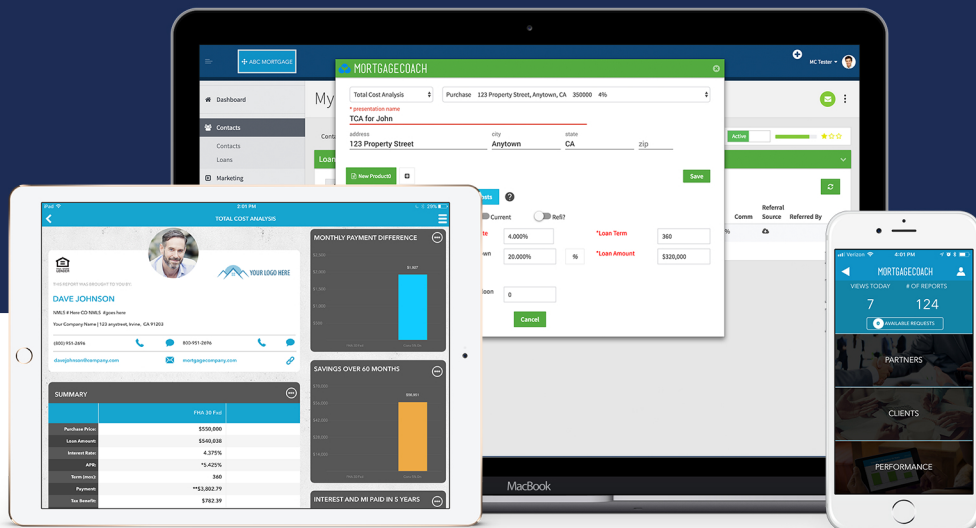


Mortgage Coach and Velma Integration



Building Strong Relationships - close more loans and lower marketing costs with a seamless integration.

Mortgage Coach is the mortgage industry's only comprehensive borrower conversion platform. With Mortgage Coach's Total Cost Analysis, financial and real estate professionals provide clearly illustrated mortgage options with detailed financials, charts, video narration, and real-time updates on any device, ensuring an informed home loan decision.

Velma is a comprehensive marketing automation solution that offers a clean, simple user interface for Loan Originators to build homebuyer and referral source relationships. Velma offers marketing automation, contact management, partner management, and a library of branded marketing material. The Mortgage Coach integration with Velma allows the Loan Originator to simply select a borrower from within the Velma interface and start a new proposed or closed loan Total Cost Analysis (TCA).

- Select either a new borrower or a past client to start a TCA from within the Velma UI
- Launch Mortgage Coach with the click of a single button
- Add multiple products, fee templates, monthly costs to create the TCA
- Narrate, view, record a video and select a branded email from Velma to attach to the TCA



Supports digital production and delivery of marketing content embedded with a Total Cost Analysis



Maximize daily productivity and save time through one-click integrated automation



Deepen contact and partner relationships with customized, advice-based marketing



Ensure compliant, branded marketing content with automated approval processes and monitoring