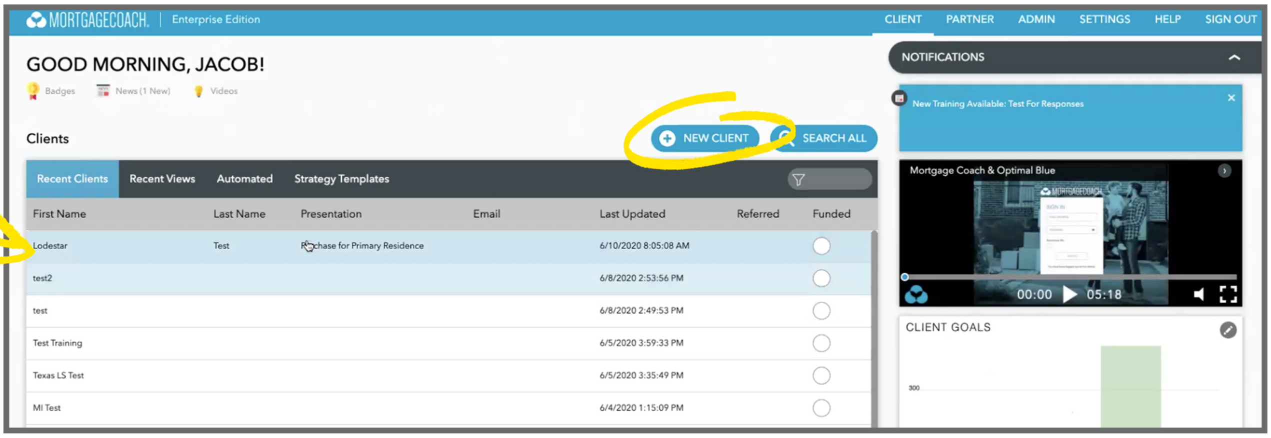
How to use the Lodestar and Mortgage Coach Integration

1

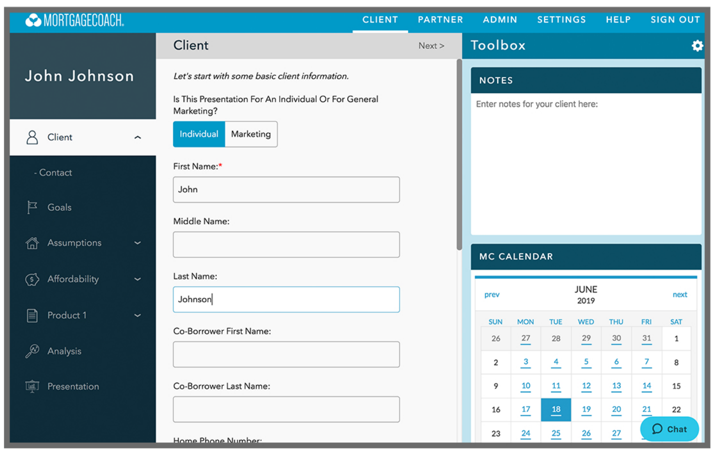
LOGIN to Mortgage Coach.

CREATE a new client, by clicking on **NEW CLIENT**
OR
DOUBLE CLICK an existing client.

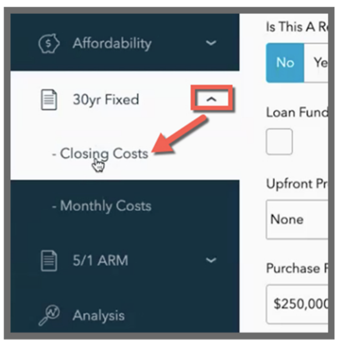


2

NEW CLIENT:
COMPLETE the tabs on the left-hand side, filling in client data and product information.

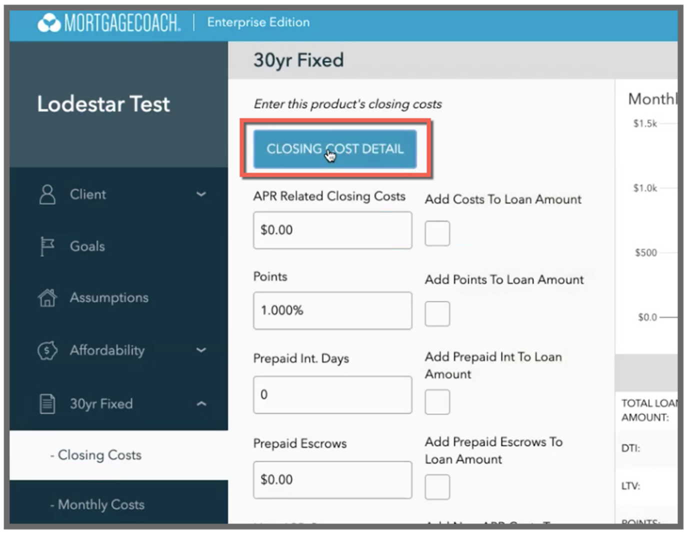


EXISTING CLIENT: Using the tabs on the left-hand side, **CLICK CLOSING COSTS** under the first product tab.



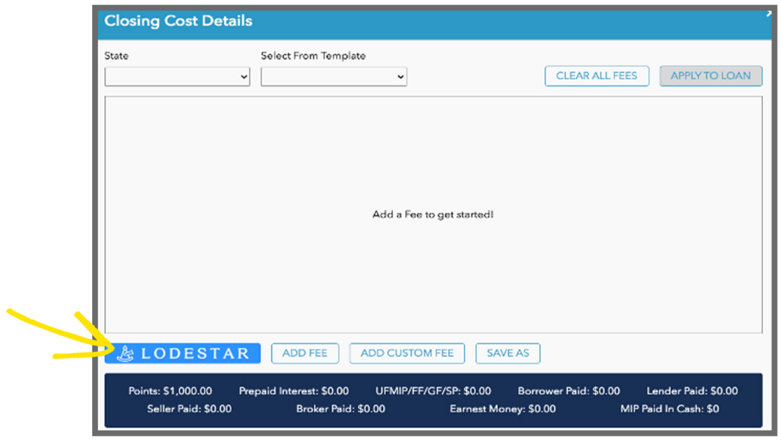
3

CLICK the **CLOSING COST DETAIL** button.



4

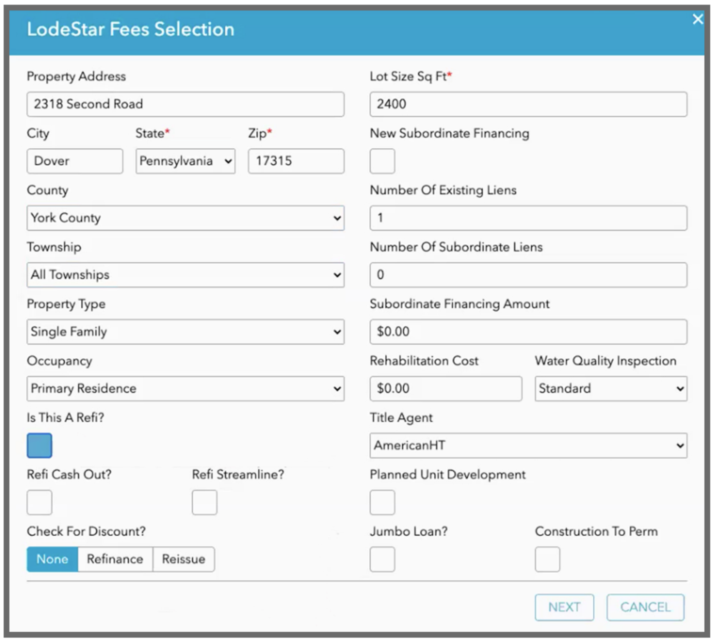
CLICK the **LODESTAR** button.



5

COMPLETE all the necessary information.

CLICK NEXT.

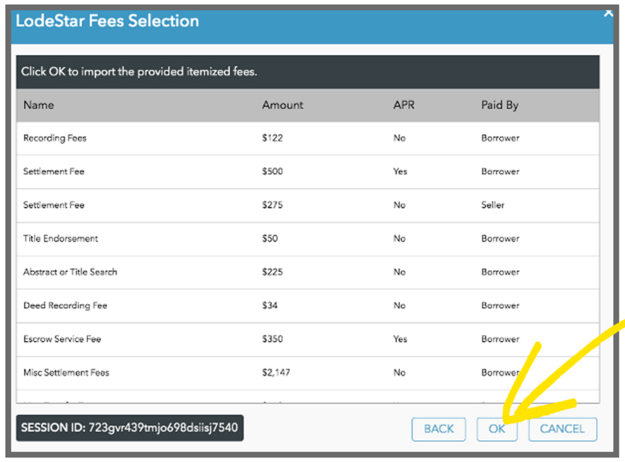


All the fields with a red asterisk are required fields to complete a fee quote. If the address was previously entered on the Client Tab (under contact) with the City, State, and Zip Code, the information would automatically populate on the form for you. The system will prefill the Townships & Counties based on the zip code entered. There are drop-down indicators available to make any changes.

Please answer all related questions to your transaction appropriately as needed. Before advancing to the next screen, users can select their preferred Title Agent to retrieve a fee quote.

6

CLICK OK to append all the fees shown to the Closing Cost Details screen within the Advice Engine for the transaction.

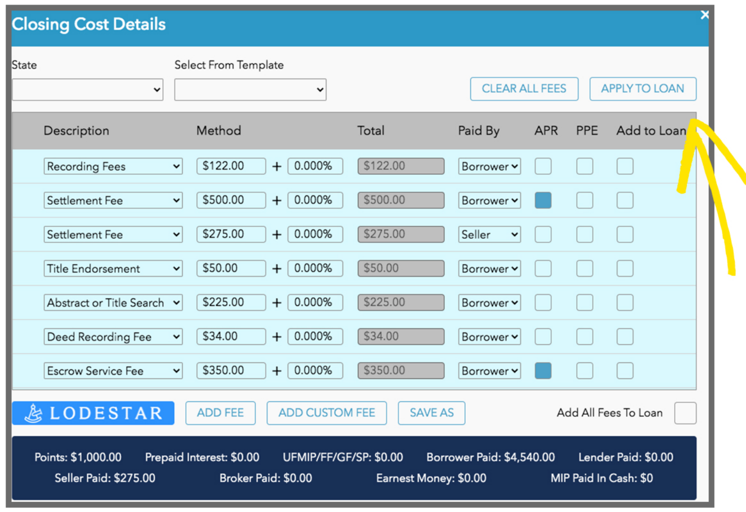


The fees are returned based on the questions you've answered previously. The fees will indicate which items are Lender Paid, Borrower Paid, Seller Paid and APR related.

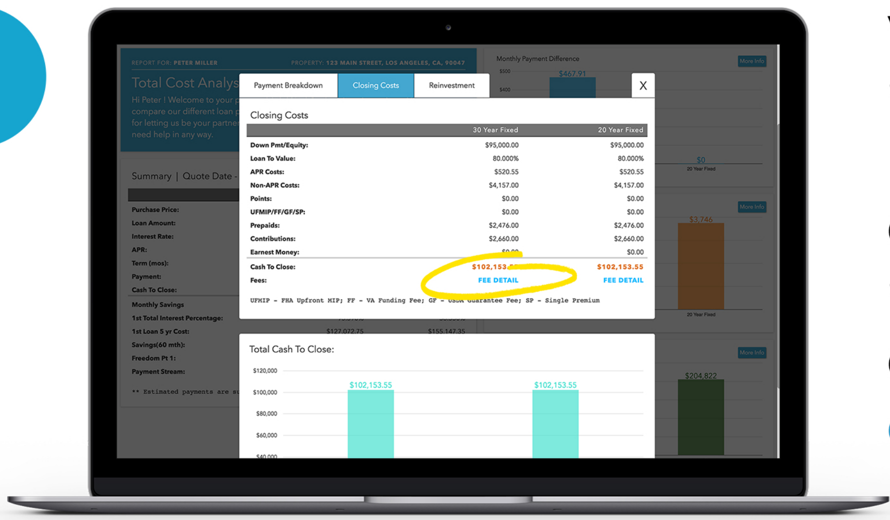
7

All appended title/settlement fees from Lodestar are indicated in blue.

CLICK the **APPLY TO LOAN** button.



8



VIEW THE FEES in your presentation!

CLICK MORE INFO in the Summary section.

CLICK the **CLOSING COSTS** tab.

CLICK FEE DETAIL under each product.