

Growth

Make the Most of Your Relationships

Contact Name	Primary	Work Phone	Mobile Phone	Type	Status
Cooper, Sandra		(888) 646-3535	(888) 529-6262	Contact	Active
Gartner, Jeff		(777) 666-4747	(777) 666-5255	Contact	Active
Kranitz, Ben	Yes	(888) 646-3535	(888) 637-6262	Broker/Owner	Active
Stevens, Greg		(777) 666-4747	(777) 666-5255	Branch Manager	Active
Swan, Brian		(747) 444-3366	(747) 662-5151	Loan Officer	Active
Townsend, Susan		(888) 646-3535	(888) 929-6262	Processor	Active
Williams, Brian		(888) 757-4646	(888) 666-5353	Processor	Active

Step by Step

- Lead is automatically imported from web form, e-mail, Excel, etc.
- Broker is profiled and application is imported/attached to account record.
- Manual or Auto-assignment to Account Executive
Welcome e-mail, letter, phone call scheduled.
- AE (Account Executive) uses Mortgage iQ to schedule calls, to do's, meetings, etc.
- AE can easily view loan activity on Broker Account View.
- AE is automatically alerted via email of any critical issues on active loans .
- AE can drill down to Hierarchical view of other related companies to each Broker Account.
- AE can be alerted to fraudulent behavior of a broker - record can be flagged and subsequent applications can be vetted in the system to reduce fraud.
- Marketing can penetrate the database with targeted marketing campaigns.
- Account Executives can have calls automatically scheduled for them to follow up on marketing campaigns.
- Broker data and activities can be synchronized with PDA.
- Workflow and Dashboards can be tailored to YOUR business model and much more.

CRMNOWTM
 Harnessing the Power of Relationships in Business

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Leverage.

Balance.

Mortgage iQ.[®]
 CRM for Wholesale Lending

True Customer Relationship Management for Your Mortgage Company

Leverage. Balance. Elegance.

Successful mortgage lending is process driven. Miss a detail and your loans won't close. Growing your mortgage company on the other hand, is people driven. Fail to relate... your customers and staff go elsewhere. How can you balance people and process while leveraging both to your advantage? Mortgage iQ® is your answer.

Developed and supported by a team of CRM and Mortgage Industry professionals, Mortgage iQ® is the first and most comprehensive CRM software designed with your mortgage company in mind. It's optimized to oversee your company's unique work flow and to successfully deploy your company's business strategy. Mortgage iQ® effectively manages information and relationships in ways that deliver tangible and measurable results. Results like efficiency, accuracy, profitability and growth.

Mortgage iQ® makes your goals not only achievable, but provides a one-of-a-kind platform to transform. Beyond the ever present bottom line, your company's culture is the ultimate benefactor of Mortgage iQ®'s innovative, forward looking technology. Strengthen your culture and you'll strengthen your company.

Your Mortgage Company's Capacity... What's its Limit?

None, when you deploy Mortgage iQ®.

Visualize your mortgage firm or banking company as truly it is: a fabric of densely packed strands of thread; crisscrossed at many points, with people, processes and events combining in ways that make you who you are, but in amalgamations not always organized or optimized. Managing these intersections is anything but a passive

process. Indeed, as your mortgage business grows, so too does the multitude of relationships, processes and procedures. Mortgage iQ® makes sense of them all by transforming mere data into practical, timely information.

For instance, think about how many spreadsheets your company must coordinate to generate pipeline reports and forecasts. Mortgage iQ® creates them in a swift click.

When gathering data, how many locations must you presently access to con-

solidate decision-critical information? With Mortgage iQ® under the hood, all your data is not just on-hand in a single location, it's organized to quickly clarify your course of action. And what about your top producers? Is your current data management system conducive to their success and to your mutual growth? Mortgage iQ® automatically manages tasks, activities and processes to ensure your team produces maximum results.

The Mortgage iQ® Daily Groove

Manager	Marketing	Account Executive
MIQ Schedules Upcoming Activities Phone Calls, To DO's, Alerts & Messages	MIQ Coordinates All Correspondence Emails, Letters, Faxes, Notes, File Attachments	MIQ Sets Forth & Assigns Action Items Broker Prospects/Customers/Contacts/Borrower Files
Follow-up Alerts/Approvals Marketing/Campaigns	Follow-up Alerts/Approvals Brokers/Loans/Issues	Follow-up Alerts/Approvals New Broker Leads
Pipeline Fundings/Cancellations	Priorities New Loan Programs	Pipeline Support/Education
Productivity Measure Performance	Access Campaign Results/ROI	Networking New Broker Leads

With Mortgage iQ® under the hood, all your data is not just on-hand in a single location, it's organized to quickly clarify your course of action. And what about your top producers? Is your current data management system conducive to their success and to your mutual growth? Mortgage iQ® automatically manages tasks, activities and processes to ensure your team produces maximum results.

With Mortgage iQ®, managers, sales and marketing staff, experience immediate, quantifiable productivity boosts. Sporting a unified desktop dashboard and a single, collaborative data repository, Mortgage iQ®

provides your employees with what they really need: Perspective. Mortgage iQ® unravels your interwoven corporate fabric and reveals a holistic view of prospects, customers and loan data. Your staff can market, manage, process and close loans with spectacular results. And they can do all of this in far less time with greater accuracy and reliability.

Customers for Life

Consider just a few of Mortgage iQ®'s capabilities and how your mortgage company can improve your performance: Mortgage iQ® dramatically improves your relational skills. For example, lead management is a breeze. You'll never miss another sales opportunity because Mortgage iQ® facilitates assignment of every lead to an appropriate team member. Your staff knows who is responsible for whom and can better contribute to the sales process. Purchased leads never disappear into a black hole and referrals can be distributed among your team members in a wide range of predetermined and prioritized sequences. Everyone on staff enjoys a fair share of new business.

Mortgage iQ® benefits communication, both internally and with your customers and suppliers. Phone calls and follow-up can be assigned, scheduled and results tracked. Your staff functions far more effectively as a team because everyone works with continuously updated information. Where customers are concerned, they'll never be left unattended. Mortgage iQ® lets you build and deploy a systematic, fully automated follow-up sequence that eliminates accidental forgetfulness.

It has been said that resolving problems is the true test of a company's mettle. And in



- Consolidated Broker Dashboard provides fast answers and increased productivity**
- All relationships are tracked and managed within Mortgage iQ® (Brokers, LO's, processors, investors, agents, vendors)**
- Dashboard elements can be customized to match your Business Workflow requirements**
- All notes, history and upcoming activities are tracked and updated (emails, phone calls, documents, letters)**
- Lead source is easily tracked for ROI on your marketing efforts. Leads can be automatically inserted & assigned from your web site***

*Requires additional configuration and/or other applications

The screenshot shows the SalesLogix Mortgage iQ interface. At the top, it displays 'SalesLogix - [Account: AAA Financial]'. The main window is divided into several sections:

- Accounts:** Shows details for 'AAA Financial' with fields for DBA, Address, Mailing, Owner, and Acct.Mgr. A 'Broker Scorecard' shows Potential 90 and Actual 50.
- Contacts:** A table listing contacts with columns for Contact Name, Primary, Work Phone, Mobile Phone, Title, City, State, Type, and Status.
- Loans:** A table listing loans with columns for Broker LO, Loan Number, Status, Estclose, Borrower, Loan Purpose, Property Address, Property City, Loan Amt, Program, and Rate.

Numbered callouts (1-9) highlight specific features: 1. Account details; 2. Contact list; 3. Broker scorecard; 4. Loan list; 5. Relationship dropdown; 6. Loan details; 7. License information; 8. Activity/lead management; 9. Calendar/activities.



- Rollup loan detail from your back end system* provided for easy access**
- Track state licensing information for each broker contact**
- Tight integration with Microsoft® Outlook® ensures all emails and related text and related files (broker applications, letters, loan documents, etc.) are automatically attached for faster access within a single repository**
- All Broker contact data and calendar/activities can be synchronized with Outlook and into your favorite PDA**

*Requires additional configuration and/or other applications

Build Your Corporate Culture into a Force Your Customers Will Come Back For

the mortgage industry, problems occasionally arise. Here, Mortgage iQ® helps your company shine.

Transform Mere Potential into Exceptional Performance

Potential, for all of its value, is of little consequence without implementation. Every loan rep must close the sale. Every potential borrower must submit a completed loan app. Every Broker must gather and organize information, while your processors verify documentation, ensure compliance and coordinate title, funds and recording. Nothing of value takes place without timely information and appropriate action. Mortgage iQ® equips your mortgage company to optimize a host of shared information, relationships and to maximize action.

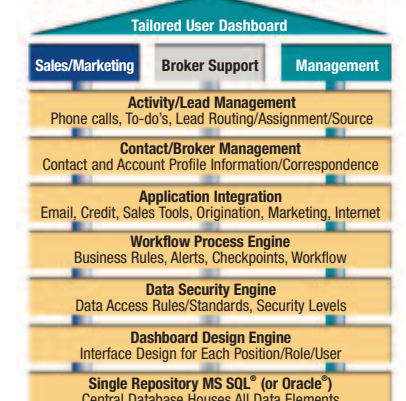
Mortgage iQ® seamlessly unites mission-critical tasks with the right people at the right time. Enhance your company's work flow, from initial contact with brokers, right through to funding and recording. With Mortgage iQ®, nothing falls through the cracks. New leads, regardless of source, are accessible to every department. Links to agents, home builders, escrow officers and title companies are available with a click. Details are not left to chance. You'll close more loans. You'll close loans that others can't.

The Depth of the Foundation Determines the Height of the Wall

Consider the life cycle of the typical lender-broker relationship: Throughout your affiliation, hundreds of calls, emails, documents and correspondence are exchanged between a dozen or more staff members, brokers, title & escrow officers, and of course the borrower. Coordinating and tracking these activities is vital. Here, Mortgage iQ® is foundational to your success.

Mortgage iQ® fully automates your loan apps by importing broker and loan information from your web site or by electronically creating a 1003 from data stored within Mortgage iQ®. Mortgage iQ® integrates seamlessly with popular mortgage software such as Calyx® Point® and DataTrac® linking your loan files to the appropriate staff members and by populating many forms and docs for processing, submission and funding. Once a loan is approved, Mortgage iQ® schedules and

The Mortgage iQ® Architecture



tracks a critical path to closing and communicates progress to the appropriate staff members, your broker and others affiliated with the loan file. At closing, Mortgage iQ® automates periodic contact with your broker to ensure their complete satisfaction with your efforts and just as important, to generate new leads and referrals.

Stay Informed. Be Transformed

Needless to say, mortgage lending is fiercely competitive. That's why even the most innovative business plan often is hamstrung without a tactical advantage. Mortgage iQ® supplies just the advantage you need by orchestrating all of your resources and by deploy-

ing them when and where they are needed. Your efforts are timely, appropriate and deliberate. Mortgage iQ® lifts your mortgage company to new levels of accomplishment as it empowers your team and your affiliates. Mortgage iQ® is much more than mere software. It's your highway to growth.

If your mortgage company employs at least ten AE's or currently supports 20 or more users, you're but a call away from transformation. There's no better way to raise your competitive iQ. Call today to schedule a personalized demonstration.

Broker Management & Monitoring

- Alerts when loan volume drops suddenly
- Congratulate broker on increased volume
- Automated call inactivity alerts
- Automated lack of submissions alerts

Advanced marketing

- Track leads from shows
- Marketing campaigns allow for measurement of click through's, responses, etc.

Data Access

- Outlook/pda integration - Syncs Broker with any PDA through Outlook

Account Reassignment

- Easily realign accounts as AE's come & go
- Assign activities/to do's to other team members/assistants

Powered by SalesLogix®... the leader in CRM and Sales Force Automation Technology



With Mortgage iQ® serving as the backbone of our business process, we've expanded our loan volume without hiring new staff.