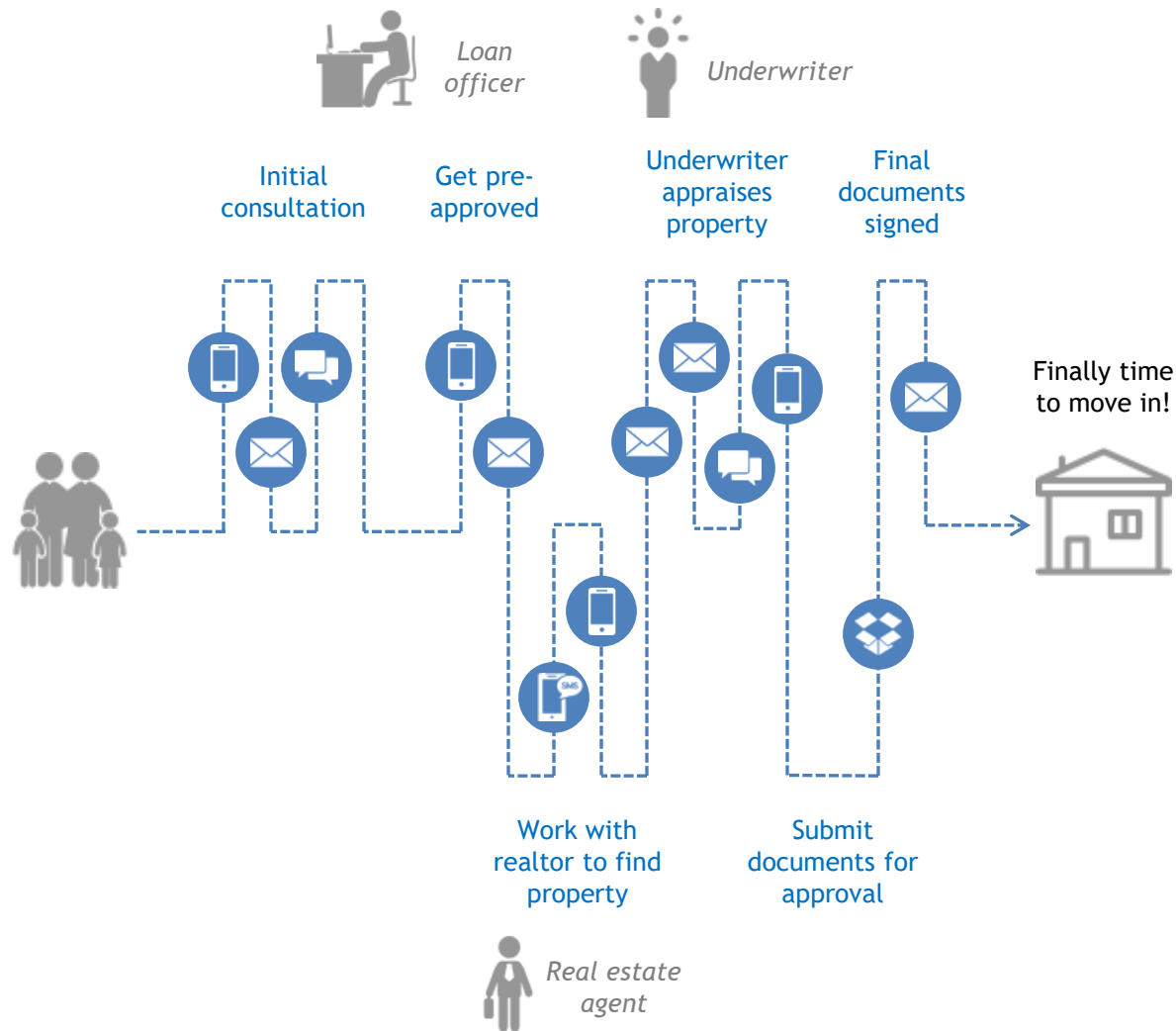
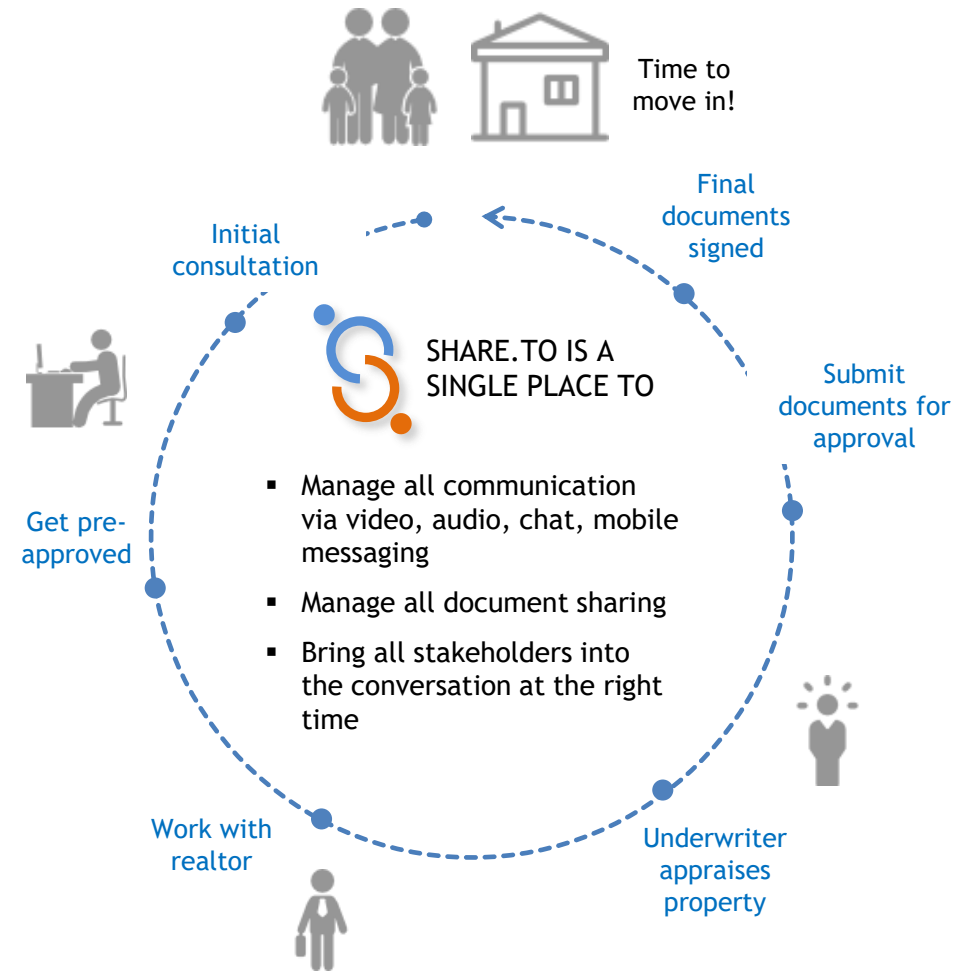


MORTGAGE PROCESSING TODAY



- MULTIPLE TOUCH POINTS
- EXTENDED LOAN CYCLES
- LOST/SCATTERED INFORMATION
- LACK OF TRANSPARENCY

MORTGAGE PROCESSING WITH SHARE.TO



- CENTRAL TRANSPARENT PROCESS
- SHORT LOAN CYCLES
- ENGAGED CLIENTS

MORTGAGE PROCESS ENABLED BY SHARE.TO

- Loan Officer invites buyer into a Share.to workspace
- Officer offers preliminary consultation using preferred communication channels, and gives loan pre approval
Mobile chat, video/audio conf, web chat
- Buyer invites real estate agent to help narrow property search based on loan availability. Finalizes property choice.
- Loan Officer invites Underwriter to assess property
- Client provides W2, Taxes, Credit History as supporting documentation for loan
- Buyer signs loan agreement right within Share.to as is all set to get ownership of property!

Tammy Dean has joined

Eugene, What are my choices? What is the process?

Tammy, can we hop on a quick video conference?

Eugene started a video conference

Tammy, please find the pre approval document

[Tammy Wenger Pre-approval.pdf](#)

Jonathan Smith has joined

Sam Dunnings has joined

Tammy has uploaded [W2, 2016 Tax Returns and 3 other files](#)

Eugene has uploaded [Loan Agreement](#)

Tammy has eSigned [Loan Agreement](#)



Engage millennial clients

Bring everyone together as the conversation evolves

Omni-channel communications

Complete documentation and contracting

Meet customers where they are

