

# Internal Policies and Procedures

## **Choosing an Individual Product or Package**

Depending on your company's needs, you can purchase individual modules or purchase a package customized for your company's business model.

## **Individual Modules**

We offer modules that cover all areas of mortgage banking. We make these available as templates which the customer can customize without limitation. The products manage production quality control, compliance, employee training and operational procedures - the entire mortgage process – from origination to post-closing. We have designed packages to fit the needs of the major business models.

Individual Modules are \$395 each	Banker	Broker	Wholesaler
Origination	X	X	
Processing	X	X	X
Underwriting	X		X
Closing	X		X
Quality/Audit and Compliance	X	X	X
Operations	X	X	X
Information Security/Red Flag	X	X	X
Wholesale/Broker Operations (\$995)			X
Package Price	\$1,395	\$995	\$1,495
Package Savings (vs individually purchased)	\$2665 – 1395 = \$1370 Savings	\$1975 - \$995 = \$1080 Savings	\$3365 - \$1495 = \$1470 Savings

## **Customization Services**

These modules create tremendous value when compared to the time and cost of a company writing its own policies and procedures manuals. Instead of writing a procedure from scratch, you can simply edit – add, remove or replace.

For companies requiring extensive implementation we offer customization services which are quoted on a project basis. The primary cost component depends on how much new material needs to be written.

Servicing Modules (Including Loss Mitigation) are generally offered on a custom basis, but we have begun selling them as templates for a reduced price with the understanding that substantial customization is required.

## **Contact**

Please call Thomas Morgan (202) 550-5626 with any questions.

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