

Mortgage Policies and Procedures Made Simple

Beyond Compliance and Fraud Prevention –
Systems for Quality Control, Business
Management, Employee Training and Loss
Mitigation.

Mortgage Management Systems

Quality Control and Assurance
Managing the Process from Origination to Post-Closing



Mortgage Manuals

Mortgage Company “In a box”

- Meet state regulator, investor (wholesaler) and agency requirements
- Define your policies and procedures
- 100% Guaranteed – Constant Updates
- Provide internal training
- Protect your company from employee errors

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Mortgage Manuals

- Products cover all areas of operation –
Step-by-step
 - Origination
 - Processing
 - Closing/Funding
 - Underwriting
 - Branch Administration/Human Resources
 - Quality Control/Compliance

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Mortgage Manuals

- Provided in “Template” format
 - Customize as you see fit
 - Word Format
 - Include non-LOS forms, checklists, spreadsheets, PowerPoints
- “Custom Manuals”
 - Our expertise saves time and adds functionality

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Compliance VP

- Business Management Support
 - Broker Start-up
 - Compliance P&P Set – QC, Compliance, Info Security \$445
 - Compliance VP – “too small to comply”
 - Audit Prep – AML Review, Policy Prep \$500 each or \$79/mo
 - Broker to Banker

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LenderTraining.com

- Internal Training Program Development
 - Non-NMLS Training for
 - Loan Officers
 - Processors
 - Closers
- Train the Trainer

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Sales Training

- Loan Officer Sales Process
- Modular Approach
 - Interactive Seminars
 - Follow Up Coaching – Individual or Small Group
 - Marketing Plan Development

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Loan Officer Boot Camp

- Self-Paced Learning Programs
 - Origination
 - Product Knowledge
 - Process
 - Marketing
 - Processing
 - Closing

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