

Factsheet - Canadian Mortgage Technology

Filogix Expert solutions

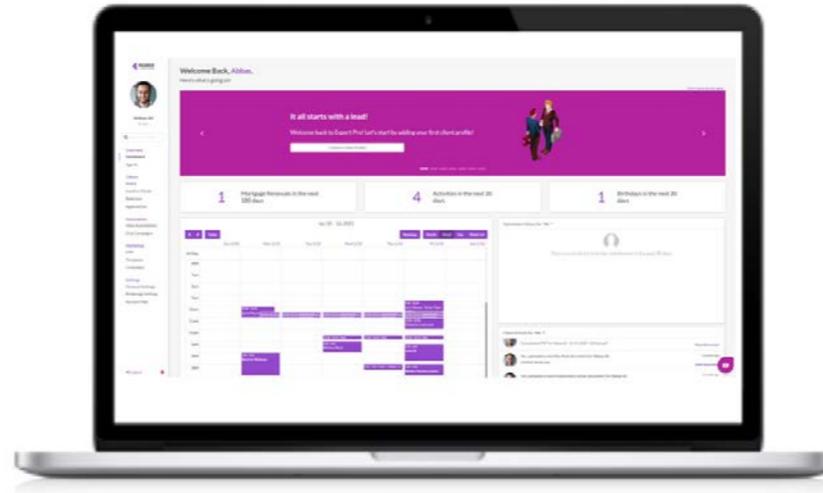
Filogix solutions empower you to run your business, your way, anytime, anywhere.

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Digitizing the full end-to-end mortgage process.//

Shaping the digital mortgage experience

Filogix's powerful and easy-to-use solutions are available today to enable all mortgage professionals to unlock their potential. Our digital solutions are available from any device, anywhere so you don't miss a deal.

We all know that communications and digital interactions are crucial throughout the mortgage process; Filogix Expert solutions empower you to do more.



[Filogix Expert Pro demo video](#)

Choose the version that best suits your needs

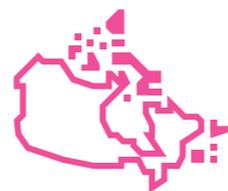
	Filogix Expert Plus	Filogix Expert Pro
Board		
Create custom workflows	✓	✓
Manage access and permissions, customize statuses	✓	✓
Team collaboration	✓	✓
Applications		
Import full applications from Filogix Expert and continue to sync updates after import	✓	✓
Retrieve client Notice of Assessments (NOA) and other tax documents quickly, seamlessly and securely	Limited	✓
Fully customizable client application	✓	✓
Send e-sign packages to your clients	Limited	✓
Send email invite to your clients	Limited	✓
Auto sync applications with Filogix Expert	✓	✓
Validation based on Filogix Expert business rules	✓	✓
Request consent automatically to retrieve credit bureaus from clients	✓	✓
Submissions		
Full data push to Filogix Expert for submission	✓	✓
Direct-to-lender submission	✓	✓
Document collection		
Document organization by application	✓	✓
Custom document templates	✓	✓
Easy consolidation of document in one PDF	✓	✓
Bank statement retrieval	Limited	✓
Secure document storage in Canada	✓	✓

	Filogix Expert Plus	Filogix Expert Pro
Automations		
Daily tasks	Limited	✓
CRM actions	Limited	✓
Team sharing	Limited	✓
Customized notifications (incl. reminders, renewals, birthdays, etc.)	Limited	✓
Platform personalization		
Logo and brand colors	✓	✓
Branded communications to clients	✓	✓
Client portal		
Simple application: An easy to use, shorter version of the full application	✓	✓
Full application: A fully customizable application form	✓	✓
Secure client document uploads	✓	✓
Integrated email marketing		
Create fully featured drip campaigns based on Board-triggered events	Limited	✓
Create customized email marketing	Limited	✓
Marketing metrics	Limited	✓



Filogix Expert Pro and Filogix Expert Plus are the newest members of the Filogix Mortgage Marketplace

The Filogix Mortgage Marketplace is Canada's largest marketplace specifically serving the mortgage industry. It is constantly evolving by adding new lenders and industry partners to serve you best. It ultimately allows you to connect to:



230+
lenders

60+
partners
and growing

To speak with us about how Filogix Expert solutions can help you, visit [Finastracanada.com](https://finastracanada.com)

About Filogix

Filogix has served as the hub of the Canadian mortgage industry for almost two decades, offering secure, reliable connectivity to brokers and lenders. We provide trusted mortgage lending products, that enable the effective management of the sales process from origination through underwriting. As the mortgage landscape continues to change, Filogix is prioritizing advances to support the industry into the future. We're investing in a more open infrastructure and building connectivity to create a complete mortgage marketplace, helping mortgage professionals do business with more choice, speed and reliability than ever before. Learn more at finastracanada.com

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