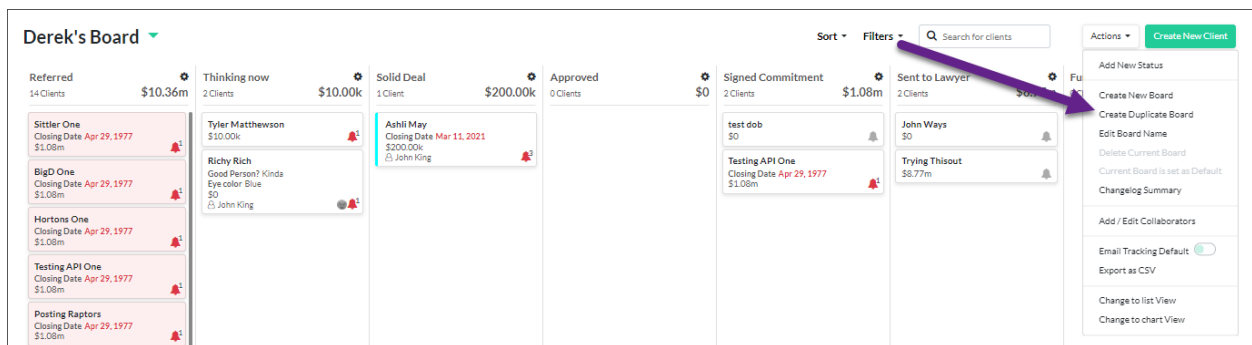


Say Goodbye to Board Boredom!

We're excited to introduce some awesome enhancements to the board functionality in Expert Pro! These updates give you more freedom and control over your client boards, making your life easier and more organized.

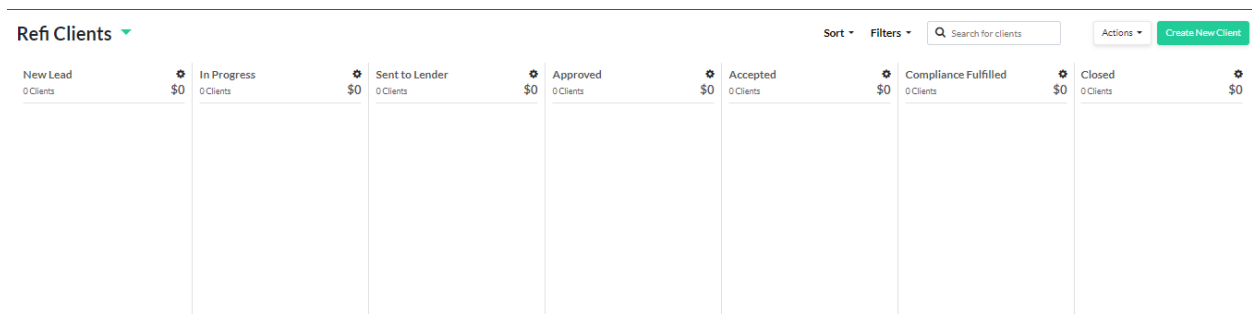
Duplicate Board Creation

You can now create duplicate boards with just a click. It's a time-saving feature that lets you replicate existing boards and maintain consistency across your boards. Don't worry, when you duplicate a board, you still have the freedom to update the statuses after creation; we just wanted to save you a bunch of time for the more important stuff!



Enhanced Default Board Statuses

We've jazzed up the default board statuses based on valuable user feedback and industry insights. With these revamped default board statuses, you'll have a smoother workflow and a clearer understanding of your clients' journeys. Happy mortgage managing!

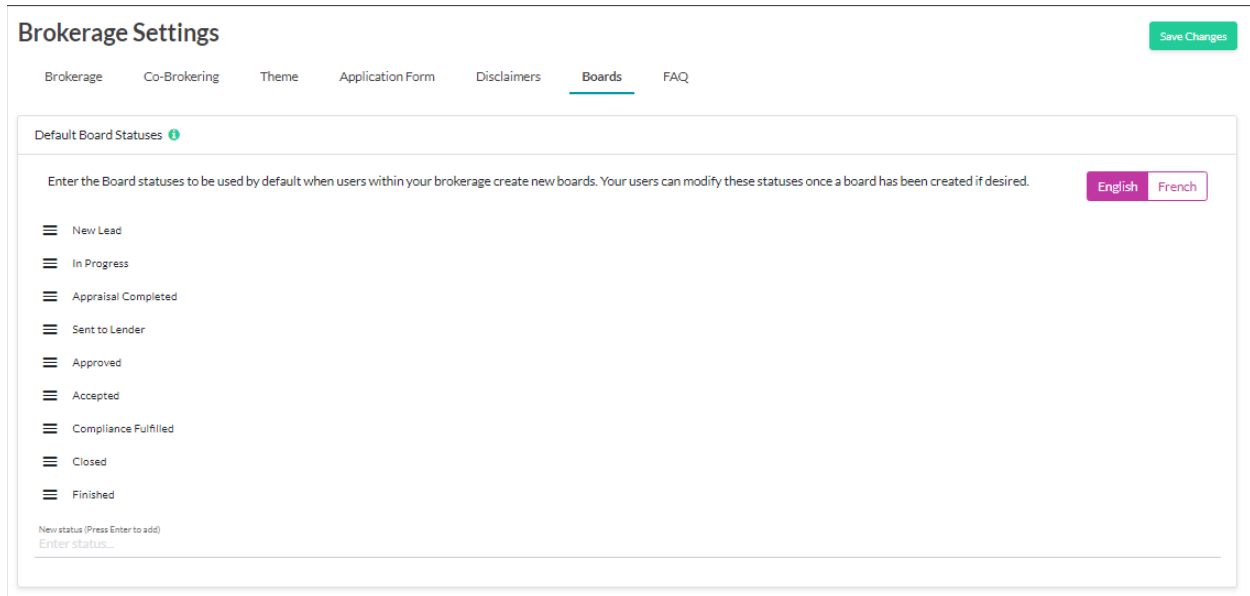


Brokerage Default Boards

If you're a brokerage owner, you'll love this one! Now, brokerage admins have the power to set default boards for all their users in one fell swoop! While users can still customize the board statuses as they please, this feature ensures that everyone starts off on the same page with consistent default statuses

on each new board. It's all about unity, simplicity, and saving time. So go ahead and set the stage for seamless collaboration within your brokerage, knowing that everyone is in sync from the very beginning.

To set up default boards for your users, simply use the Brokerage Settings page, select Boards, then add / remove / reorder statuses as you wish. If your brokerage consists of both English and French users, don't worry - we've got you covered! Simply switch between the English and French tabs to configure the respective default boards., and don't forget to save your changes!!



Brokerage Settings Save Changes

Brokerage Co-Brokering Theme Application Form Disclaimers **Boards** FAQ

Default Board Statuses ⓘ

Enter the Board statuses to be used by default when users within your brokerage create new boards. Your users can modify these statuses once a board has been created if desired. English French

- ☰ New Lead
- ☰ In Progress
- ☰ Appraisal Completed
- ☰ Sent to Lender
- ☰ Approved
- ☰ Accepted
- ☰ Compliance Fulfilled
- ☰ Closed
- ☰ Finished

New status (Press Enter to add)
Enter status...

Document Automations – Switching Things Up!!

We understand that consistency is key when it comes to document automation. That's why we're excited to introduce the same powerful feature for switch/transfer applications as you've come to expect for purchases, refinances, and pre-approvals. Now you can automatically request specific documents when a client sends you a switch/transfer application.

Co-Brokered Applications: Sharing is Caring...and Profiting!

We're excited to announce a valuable enhancement to Expert Pro that brings increased transparency to your mortgage workflow. With our latest update, you will now receive a clear notification when a new application is the result of a co-broker action. Within your listing of applications, you can now easily identify not only which applications were a result of someone co-brokering to you, but the name of the person that sent it to you is also displayed.

Showing Applications for Derek Matthewson (You) Filter Search for clients Import Applications Add Application

Showing 60 out of 76 records (total of 110 applications)

FULL NAME	EMAIL	LATEST APPLICATION STATUS	LATEST APPLICATION CREATED DATE		
CU CSV Update Approval	derek.matthewson@finastra.com	Under Review	June 7, 2023	★	Add to Board View Applications
SO Snoopy ONE	derek.matthewson@finastra.com	Under Review	June 15, 2023	★	View on Board View Applications
R Renewal A Day Late	derek.matthewson@finastra.com	Completed	June 1, 2023	★	Add to Board View Applications
R Renewal Antagonist	derek.matthewson@finastra.com	Completed	June 13, 2023	★	View on Board View Applications
JL Co-brokered Julia Last	halka@fgc.ca	Under Review	July 5, 2023	☆	Add to Board View Applications
<p>Application ID: 6688 Created On: July 5, 2023 4:47 PM (7 Minutes Ago) Source: Broker Portal - co-brokered by John Smith Status: Under Review Consent Status: Not Obtained</p> <p>Open Application Open Documents</p> <p>+ Copy Application</p> <p>+ Create Additional Application</p>					
Np Newbeeee Partner API Application	refinance+application+34233@moregidge.com	Pending	June 30, 2023	☆	Add to Board View Applications

From the Department of Redundancy Department...

We're thrilled to announce a refreshing update to Expert Pro that declutters the user interface and enhances your overall experience. In response to valuable user feedback, we have eliminated redundant placeholders that duplicated the field headings throughout the application.

We understand the importance of a clean and intuitive front end, and this enhancement ensures a more streamlined and visually appealing interface.

Previous Look:

Personal Details				Disabled CO-APPLICANT			
JOHN SMITH MAIN APPLICANT							
Salutation	First Name	Middle Name	Last Name	Salutation	First Name	Middle Name	Last Name
Salutation	John (4/20)	Middle Name	Smith (5/40)	Salutation	First Name (0/20)	Middle Name	Last Name (0/40)
Email	Email (0/50)			Email	Email (0/50)		
Cell Phone Number	Home Phone Number	Work Phone Number		Cell Phone Number	Home Phone Number	Work Phone Number	
Cell Phone Number	Home Phone Number	Work Phone Number		Cell Phone Number	Home Phone Number	Work Phone Number	
Date Of Birth	Social Insurance Number	Language Preference		Date Of Birth	Social Insurance Number	Language Preference	
YYYY-MM-DD	XXXXXXX	English		YYYY-MM-DD	XXXXXXX	Language Preference	
Marital Status	Dependents			Marital Status	Relation To Main Applicant	Type	
Marital Status	0			Marital Status	Select	Type	
First Home	First Home			First Home	First Home		
<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No			<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No		

Updated Look:

Personal Details				Personal Details			
JOHN SMITH MAIN APPLICANT				CO-APPLICANT			
Swap Applicant				Disabled			
Salutation	First Name	Middle Name	Last Name	Salutation	First Name	Middle Name	Last Name
	John (4/20)		Smith (5/40)		(0/20)		(0/40)
Email				Email			
Cell Phone Number				Cell Phone Number			
Home Phone Number		Work Phone Number		Home Phone Number		Work Phone Number	
Date Of Birth	Social Insurance Number	Language Preference		Date Of Birth	Social Insurance Number	Language Preference	
YYYY-MM-DD	XXXXXXXXXX	English		YYYY-MM-DD	XXXXXXXXXX		
Marital Status	Dependents			Marital Status	Relation To Main Applicant	Type	
	0						
First Home				First Home			
<input type="radio"/> Yes <input type="radio"/> No				<input type="radio"/> Yes <input type="radio"/> No			

New Brunswick’s Mortgage Broker Discloser to Borrower Form is Now Available on Expert Pro!

To access the Mortgage Broker Disclosure to Borrower document, simply navigate to the forms section for any New Brunswick deal within Expert Pro. From there, you'll be able to generate and customize this document specific to your client's needs. We hope this new addition simplifies your mortgage processes and strengthens your compliance efforts in New Brunswick.

Nature of Relationship
← Back
Print

Finastra acts as an intermediary between the borrower (you) and lenders who have authorized it to offer their mortgage products to borrowers.

In this service relationship, Finastra is authorized to offer the mortgage products of multiple lenders to borrowers who are seeking to secure a mortgage.

Finastra is not employed directly or indirectly by any of the lenders for whom it is authorized to offer mortgage products.

Finastra duties to you, the borrower, are to act competently and honestly and to disclose all relevant information associated with the mortgage dealing.

Compensation

Finastra and its brokers / agents will be compensated for this mortgage transaction in the following ways:

By way of commission or fee paid by the lender depending on the length of the term or the amount of the mortgage;

By way of renewal commission from the lender if you keep the mortgage loan in force and/or;

By way of fee charged to you in the amount of \$

Finastra and its brokers / agents may also receive monies or non-monetary benefits from the lender that include:

Additional commission from the lender based on volume and efficiency;

Travel rewards, points, gifts and / or marketing expenses.

Other incentives which varies with the term and interest rate

Other Fees

The borrower (you) may be responsible for additional fees, including the following: Property appraisal fees, title insurance fees, default mortgage insurance fees, home inspection fees, registration fees, and home owner insurance fees

Interest Disclosure

Finastra and its representatives, brokers and agents are obligated to disclose any direct or indirect interest they have in this transaction.



We've also managed to squash a few bugs!!

- Formatting improvements in the New Brunswick's Initial Borrower Disclosure form
- Automation emails now reflect any updates to your address/signature after scheduling
- Mortgage Amount in your client applications list now includes mortgage insurance (if applicable)
- Emails notifying you that a document has been uploaded now reflects individual applicant's name that uploaded the file
- Ontario Lender Disclosure form captures appraised value
- BC Fixed Credit Disclosure Statement – enhanced data population
- Increased accuracy on applications listing default sort
- French translation updates