

Factsheet - Canadian Mortgage Technology

Filogix Expert solutions

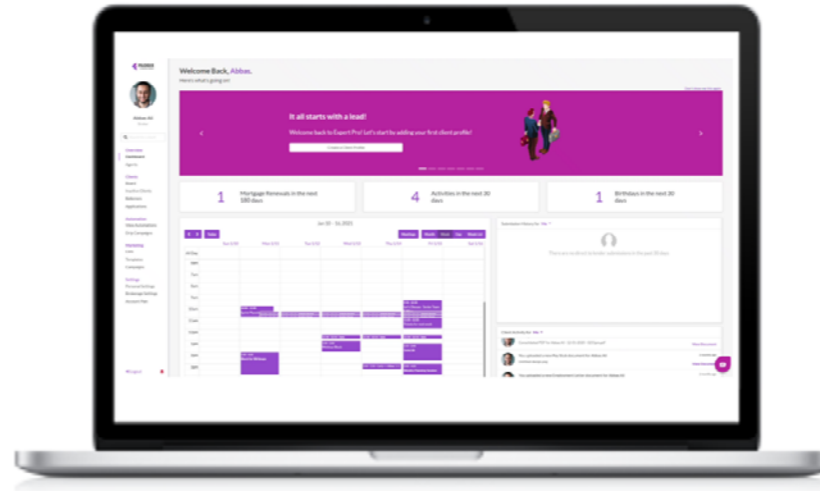
Filogix solutions empowers you to run your business, your way, anytime, anywhere.

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

Shaping the digital mortgage experience

Filogix powerful and easy-to-use solutions are available today to enable all players of the mortgage industry 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; we empower you to do more.



[Filogix Expert Pro demo video](#)

Choose the version that best suits your needs

	Filegix Expert Plus	Filegix Expert Pro
Board		
Create custom workflows	✓	✓
Manage access and permissions, customize statuses	✓	✓
Team collaboration	✓	✓
Applications		
Import applications from Filegix Expert	✓	✓
Fully customizable client application	✓	✓
Send e-sign packages to your clients	Limited	✓
Send email invite to your clients	Limited	✓
Validation based on Filegix Expert business rules	✓	✓
Request automatically consent to retrieve credit bureaus from clients	✓	✓
Submissions		
Full data push to Filegix 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	✓	✓

	Filegix Expert Plus	Filegix 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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CA 3835 / 0112

Finastra Canada HQ
5995 Avebury Road
Mississauga ON L5R 3P9
Canada

T: +1 800 732 5638

