



Private Wealth Solutions

An exceptional experience for discerning clients



**MORTGAGE
CONNECT**

Close With Confidence



The client experience is everything.

In today's financial services environment, where services and price can be quickly matched by competitors, the client experience is quickly emerging as one of the primary drivers of differentiation, and ultimately client preference. Yet, the client experience during the mortgage loan closing process falls short of expectations, where gaps exist between the type of service high net worth clients have come to expect, and what they believe they receive - even during a smooth transaction.

Most firms struggle with how best to consistently deliver an exceptional customer experience to this discerning client base.

Until now.

The leadership team at Mortgage Connect has extensive, first-hand experience working with individuals and families of unique wealth, which translates into a deep understanding of your clients' sophisticated expectations. Our roots in the high net worth financial advisory sector coupled with twenty years of experience building and operating one of the nation's top settlement service companies gives us unmatched expertise in delivering the ultimate private wealth loan closing model. Just as it is today, our mission was to consistently deliver an exceptional customer experience – one that was personal, repeatable and sustainable, resulting in client preference and loyalty.

We succeeded.

When our clients add our services into their mix, customer satisfaction and retention increased dramatically. The most effective way to serve your high net worth clients is to shift from a process-centric closing to one that is client-centric.

Mortgage Connect is uniquely qualified to deliver an exceptional customer experience at scale.

Jeff Coury,
President



Our business adheres to the values of high-touch service, innovation, and attention to detail.

SPECIALIZED CLOSING MODEL FOR HIGH NET WORTH CLIENTS

Mortgage Connect Private Wealth Closing Division is lead by industry experts and encompasses a blend of deluxe services, refined presentation, unsurpassed expertise and superior technology. Our unique closing model provides your clients with a closing experience and service levels they expect while ensuring strong third party oversight and stringent compliance.



Exceptional Compliance & Quality

Best-In-Class Operation Execution

Unsurpassed Closing Experience

INNOVATION IN PRIVATE WEALTH LOAN CLOSING TRANSACTIONS



PLATINUM CERTIFIED ATTORNEY AND NOTARY SIGNING AGENTS SUPPORTED BY CLIENT DEDICATED TEAMS

- Dedicated personal closing coordinator assigned to the financial advisor and borrower
- Platinum closing concierge available 24/7
- Operational expertise on complex transactions - Trusts, LLC's, Complex Loan Scenario's, Complex Borrowers, etc.
- Stringent customized team training based on lender process, signing requirements, communication, protocols, code of conduct, and scripting
- Expertise and proven track record working with Third Party outsourcing providers
- Comprehensive background checks and ongoing performance monitoring



UNIQUE AND MASTERFULLY CHOREOGRAPHED CLOSING EXPERIENCE

- Deluxe closing ceremony performed in any private wealth setting, attorney's office or client's choice
- Customized scripts and closing ceremony, welcome, clearance, pre-closing, scheduling, and survey calls
- Ability to review documents pre-close with client
- Expedited loan closing order processing by Private Wealth Dedicated Team Member
- Personalized borrower communication materials and educational tools
- Dedicated private wealth hotline
- Specialized outreach and reporting provides full transparency and real time status
- Customized financial advisor reporting

Unique, Innovative Closing Model Serving the Sophisticated Buyer



PROPRIETARY OPERATIONAL & TECHNOLOGY PLATFORMS FOCUS ON SPEED, TRANSPARENCY AND PROCESS EXCELLENCE



- E-Closings
- Customizable, flexible workflow design
- Extensive tracking, pipeline and exception management reporting capability
- Real-time status and interactive communication
- Exclusive eConnect Interactive Application to ensure compliance
- Seamless integration with any loan origination software
- Innovative eClosing capability offers multiple closing options
- Tracking of post-close quality control results



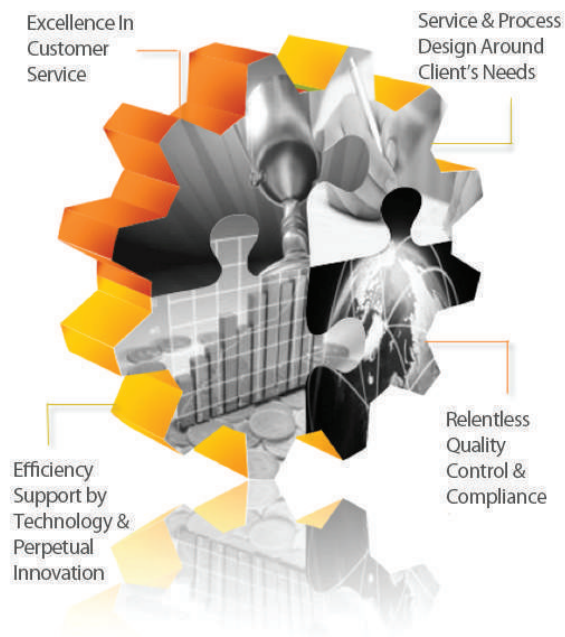
STRINGENT COMPLIANCE AND QUALITY ASSURANCE

We understand that the closing table experience may lead to a rewarding life-time banking relationship. As a Mortgage Connect Private Wealth client, you will provide your borrower with an exceptional, timely and precise closing experience, customized around your requirements and service level expectations.

As the innovators of regulatory Third Party Oversight, we apply stringent closing agent compliance processes (vetting, training and certification) to ensure brand integrity, regulatory requirements and compliance standards are adhered to.

We are also consistently monitoring regulatory changes and hold extensive knowledge of RESPA/TILA regulation and their impacts.

OUR COMMITMENT



- Independent compliance unit to ensure adherence to changing regulatory compliance requirements
- Transparency of Vetting Information
- Certification, background checks, testing, score-carding and post closing information shared for regulatory purposes
- Extensive employee and vendor regulatory compliance certification curriculum
- Stringent vendor oversight: performance, licensing and turn-times
- Automated and manual post/pre close audit reviews
- Customized performance tracking and reporting tools provide real time order and status transparency

OUR GUARANTEE

We believe that Operational Excellence is standard protocol.

We serve the Nation's largest lenders with a line of comprehensive title and closing solutions and have proven to consistently outperform our competition.

Our client dedicated teams are focused on metric driven exception management and have innovated our operational process by providing additional enhancements to the standard title and closing process.

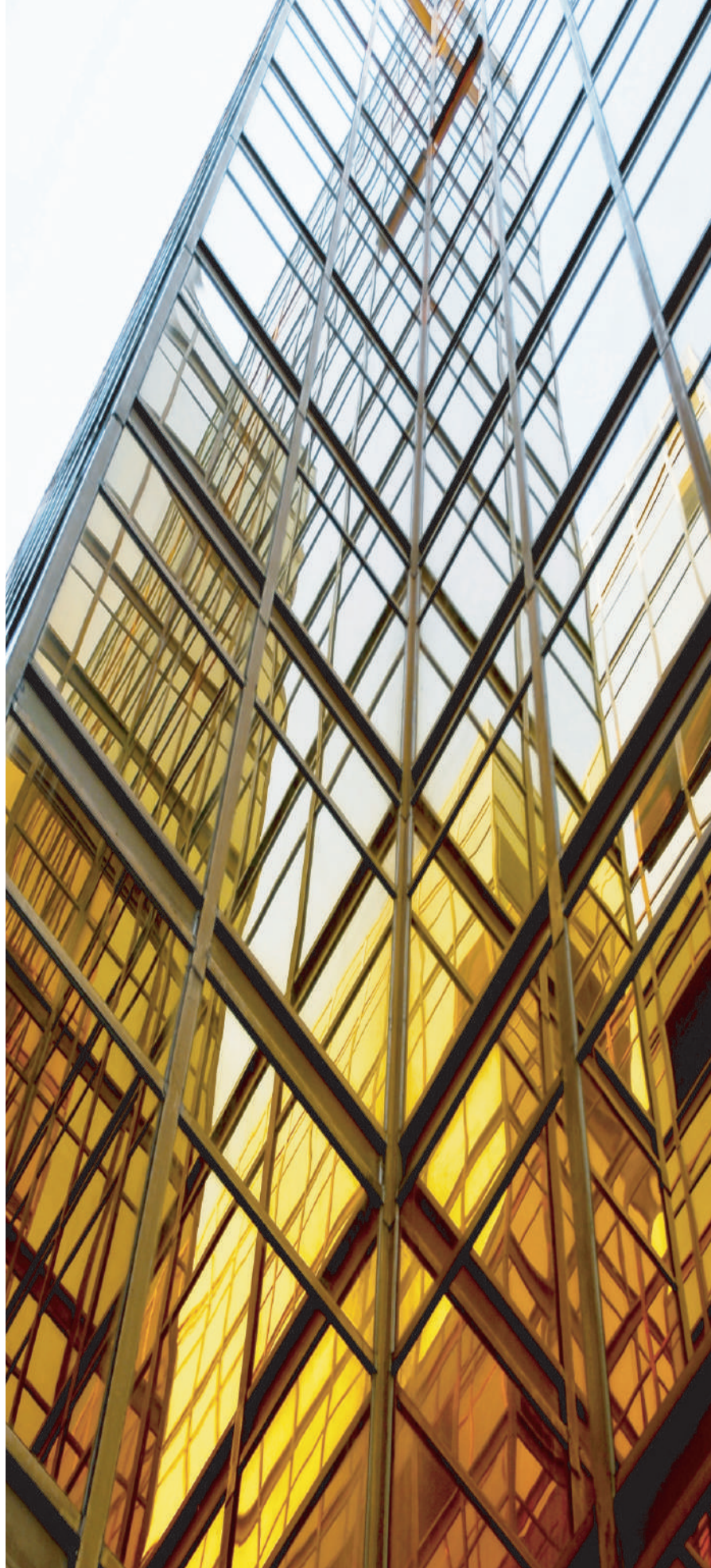
This commitment has resulted in the industry's top rated scorecards, accelerated post-closing results and superior customer satisfaction ratings.

Our Service Level Guarantee includes*:

- Scheduling closing in 4 hours or less
- Preliminary CD/ALTA preparation in 2 hours or less
- Closing confirmation within borrower 24 hours set appointment
- Final Policies within 30 days from closing or less

(* Business Days)

Thank you for providing us the opportunity to serve you.





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