

Dashboard Information

The Dashboard displays loan detail snapshot of each loan in your pipeline. These loans are recorded on a “Loan Card” shown below. The Dashboard is customizable to add or delete any loans.

- To add a loan, click “Loan Table” and select from list in the pop-up window

QuantumReverse New Loan **Loan Table** Find Loan Help

CalleyDay Right 10,025,098 MO Prospect **2**

Bob Borrower 10,023,304 FL Prospect **2**

Alice Ecline 10,025,023 FL Prospect

LOAN DOCUMENTS LOAN DOCUMENTS LOAN DOCUMENTS

HECM Loan Table Include all loans that are: Test Brokered Correspondent Transaction Archived

| Loa... | Broker | Status | Sta... | Max Claim Amo... | Borrowers | Index | Margin / Rate | Dashboard | Prio |
|------------|--------------------------------|-----------------|--------|------------------|-------------------------------|----------|---------------|-------------------------------------|----------|
| 10,002,... | Broker for Mutual of Omaha ... | Prospect | CA | \$600,000 | 2,393 - Kris Smith | 1y Libor | 3.000% | <input checked="" type="checkbox"/> | 2 |
| 10,023,... | Prospect | FL | | \$300,000 | Alice Balice | 1y cmt | 2.875% | <input type="checkbox"/> | |
| 10,025,... | Prospect | FL | | \$350,000 | Alice Ecline | 1y cmt | 2.500% | <input checked="" type="checkbox"/> | 2 |
| 10,023,... | Broker for Mutual of Omaha ... | Prospect | FL | \$30,000 | Barry Barnical | 1y cmt | 1.375% | <input type="checkbox"/> | |
| 10,023,... | Broker for Mutual of Omaha ... | Prospect | CA | \$822,375 | Ben and Beatrice Ester | 1y cmt | 2.125% | <input type="checkbox"/> | |
| 10,023,... | Malibu Funding Inc. | Prospect | CA | \$440,000 | Betty Sanders | 1y cmt | 1.625% | <input type="checkbox"/> | |
| 10,023,... | Prospect | FL | | \$350,000 | Bob Borrower | 1y cmt | 2.250% | <input type="checkbox"/> | |
| 10,023,... | Broker for Mutual of Omaha ... | Prospect | CA | \$625,000 | Bob LaBla | 1y cmt | 2.375% | <input type="checkbox"/> | |
| 10,023,... | Prospect | MO | | \$300,000 | Briley Doolittle | 1y cmt | 2.500% | <input type="checkbox"/> | |
| 10,025,... | Prospect | FL | | \$500,000 | CalleyDay Right | 1y cmt | 2.500% | <input checked="" type="checkbox"/> | 2 |
| 10,024,... | Broker for Mutual of Omaha ... | Prospect | MI | \$822,375 | Edward Lee Scenario | 1y cmt | 1.500% | <input type="checkbox"/> | |
| 10,002,... | Broker for Mutual of Omaha ... | Prospect | CA | \$600,000 | First Loan | 1y Libor | 2.250% | <input type="checkbox"/> | |
| 10,025,... | Broker for Mutual of Omaha ... | Prospect | CA | \$800,000 | Jeanne Erskine | 1y cmt | 1.375% | <input type="checkbox"/> | |
| 10,022,... | Abide Retirement LLC | Prospect | UT | \$420,000 | Joe Borrower | Fixed | 3.310% | <input type="checkbox"/> | |
| 10,022,... | Broker for Mutual of Omaha ... | Prospect | CA | \$700,000 | Johnny Test | 1y cmt | 1.375% | <input type="checkbox"/> | |
| 10,025,... | Broker for Mutual of Omaha ... | ProcessingSetup | FL | \$450,000 | Leo Leopard | 1y cmt | 2.500% | <input checked="" type="checkbox"/> | 1 |
| 10,023,... | Malibu Funding Inc. | Prospect | TX | \$375,000 | Mark Chasteen | 1y cmt | 1.750% | <input type="checkbox"/> | |
| 10,023,... | Malibu Funding Inc. | Prospect | CA | \$530,000 | Mary Ceurvorst | 1y cmt | 1.750% | <input type="checkbox"/> | |
| 10,022,... | Broker for Mutual of Omaha ... | ProcessingSetup | NC | \$650,000 | Mike Smith | 1y cmt | 2.500% | <input checked="" type="checkbox"/> | 2 |
| 10,023,... | Malibu Funding Inc. | Prospect | VA | \$585,000 | Murry Cohen and Nina Natelson | 1y cmt | 1.625% | <input type="checkbox"/> | |

To delete a loan from the Dashboard hover over green portion of Loan Card to show “X,” then click on “X” (note: this does not delete the loan from system, only removes the selected Loan Card from view in the Dashboard).

- The details in the Loan Card on the Dashboard can be customize to the user specifications.
- Hover over green portion of Loan Card and click the widget to open pop-up window with all choices.

CalleyDay Right 10,025,098 MO Prospect **2**

LOAN DOCUMENTS

HECM CMT Monthly 5% Mutual of Omaha Mortgage \$500,000

CalleyDay Right 10,025,098 MO Prospect **2**

LOAN DOCUMENTS

HECM CMT Monthly 5% Mutual of Omaha Mortgage \$500,000



Dashboard Information

You can go directly to the loan or the documents by clicking "Loan" or "Documents" on the Loan Card.

| QuantumReverse | New Loan | Loan Table | Find Loan | Help |
|--|----------|--|-----------|------|
| CalleyDay Right 10,025,098 MO Prospect | 2 | Bob Borrower 10,023,304 FL Prospect | 2 | |
| LOAN DOCUMENTS | | LOAN DOCUMENTS | | |
| HECM CMT Monthly 5% Mutual of Omaha Mortgage \$500,000 1y cmt, 2.500% | | HECM CMT Monthly 5% Mutual of Omaha Mortgage \$350,000 1y cmt, 2.250% | | |

To return to the Dashboard, simply click "QuantumReverse" on the upper left of the loan.

QuantumReverse | New Loan | Loan Table | Find Loan | Documents | Find Document | Notes | Help

CalleyDay Right
10,025,098 MO
File Started 08/04/2021
Prospect

LOAN PURPOSE
Purpose: Purchase

PROPERTY
ZIP: 63368 MO
Purchase Price: 500,000.00
Liens/Payoffs:

PRODUCT
HECM CMT Monthly 5%
Mutual of Omaha Mortgage

SET ASIDES
Monthly Servicing Fee: 0.00
Repair Set Aside: 0.00
LESA:

DISBURSEMENT OF PROCEEDS

| Item | Amount | Status |
|-------------------------|------------|--------|
| Contribution from Loan: | 254,271.00 | ✓ |
| Monthly Disbursement: | 0.00 | ✓ |
| Duration: | For Life | ✓ |
| Line Of Credit: | 0.00 | ✓ |

LOAN CHART

Cash Investment: \$245,729
Equity Reserve: \$226,500

Fees: \$9,229
MIP: \$10,000

Contribution from Loan: \$254,271

Dashboard Information

The status of the loan will be indicated by the following:

- **Prospect** - file has been started
- **Origination** - Counseling Certificate has been uploaded
- **Processing Setup** - application has been submitted

| QuantumReverse | New Loan | Loan Table | Find Loan | Help |
|--|--|---|-----------|------|
| Testy Test 10,025,200 FL Prospect | Sophie Sopher 10,025,198 MO Origination | Leo Leopard 10,025,475 FL ProcessingSetup | | |
| LOAN DOCUMENTS | LOAN DOCUMENTS | LOAN DOCUMENTS | | |
| Product:HECM CMT Monthly 5% Lender:Mutual of Omaha Mortgage Max Claim Amount:\$450,000 | Product:HECM CMT Monthly 5% Lender:Mutual of Omaha Mortgage Max Claim Amount:\$450,000 | Product:CMTAnu Lender:Mutual of Omaha Mortgage Max Claim Amount:\$450,000 | | |
| | | 8/17/2021 04:10 PM Application Package Created | | |

Dashboard Information

Additional Milestone Notifications

- Please note, when creating a Proposal the loan card will indicate "Prospect". Once the Counseling Certificate has been uploaded, it will change to "Origination".

| Milestone | Start | Actual Completion | Status |
|-----------------------------|--|---|-----------------|
| File Started | Manually | Manually | Prospect |
| Pre Approval | File Started Milestone Completed | Manually | Prospect |
| Counseling Certificate Date | Manually | Manually | Origination |
| Application Taken | Counseling Milestone Completed | Application Taken Date (Context Screen) | Origination |
| Application Docs Drawn | Application taken Milestone Completed | Creation of Application Package | ProcessingSetup |
| Setup | Application Docs Drawn Milestone Completed | Manually | Processing |
| Processing | Setup Milestone Completed | Manually | Underwriting |
| Conditional Approval | Adding Standard Conditions/ Processing Milestone Completed | UW status Approved | Closing |
| Adversed | Manually | UW Status Denied | Adversed |
| Clear to Close | Manually | Manually | Closing |
| Closing Docs Drawn | Clear to Close Milestone completed | Creation of Closing Package | Closing |
| Closing | Closing Docs Drawn Milestone Completed | Actual Closing Date | Funding |
| Funding | Closing Milestone Completed | Actual Funding Date | Post Closing |
| Post Closing | Closing Milestone Completed | Manually | Servicing |
| Servicing | Post Closing Closing Milestone Completed | Manually | Servicing |

