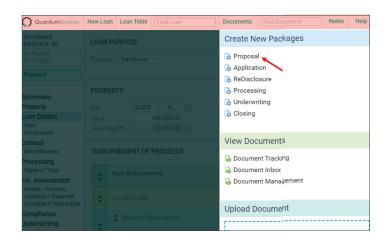
1. Click "**Documents**" tab to open drop down list with available packages to create.

	New Loan Table Find Loan Docume	ents Find Document Notes Help		
Leo Leopard 10,025,475 FL	LOAN PURPOSE	PRODUCT	ø	SET ASIDES
File Started 08/10/2021	Purpose: Traditional V	CMT Annual		Monthly Servicing Fee 0.00
Prospect		Mutual of Omaha Mortgage		Repair Set Aside 900.00
Borrowers	PROPERTY	Initial Expected		
Property	ZIP: 32505 FL	Index: 0.080% 1.220%		
Loan Details	Value: 450,000.00	Margin: 2.500% 🗹 2.500%		
Fees Comparison	Liens/Payoffs: 107,500.00	Rate: 2.580% 3.720%		
Context Miscellaneous	DISBURSEMENT OF PROCEEDS	υ	OAN CHAR	r
Processing Signers / Trust	Cash Disbursement:	23,400.00		
Fin. Assessment	-		quity Reserve	Cash Disbursement: \$23,400
Assets / Incomes Liabilities / Expenses Schedule of Real Estate	C Line Of Credit:	78,070.05 S0.00 for the 1st year		Payoffs: \$107,500
Compliance Underwriting	Monthly Disbursement:	0.00		
Broker Lock Settlement	Duration: For L	ife v		LOC: \$78,070
HUD-1 Page1 Cash Flow Ledger Settlement Details	Max Claim Amount: 450,000.00			
Shipping	Principal Limit: 234,000,00	s	et Asides: \$9	00 - MIP: \$9,000
Documents	UPB: 155,029,95	F	ees: \$15,130	
Document Tracking	PLU 66.25%			
Document lobox				

2. Select "Proposal."



 Click the "Write Cover Letter" to add a Cover Letter. (Cover letters are automatically created by Mutual of Omaha using your contact information. If changes are needed, please reach out to your AE).

Note: The screen will display the documents stacking order associated with the Proposal.

New Proposal Package	
+ Add Document 🖋 Write Cover Letter	
Name	+ Added by / Modified by / Removed by
HECM Proposal	Modified by (Misty Likis), (08/13/2021)
List of Counselors Providing HECM Counseling	Modified by (Misty Likis), (08/13/2021)

4. A pop-up window will appear, hoover slightly to the right of the "**New Letter**" verbiage, two options will appear. Click "**Open**" to review the cover letter.

Document Ter	mplate Picker	×
Cover Letter		
System Templa	ates	
New Letter	Preview Open_	

5. Click "Add to Package" to add the cover letter to the Proposal. If revisions need to be made, please reach out to your AE.

idit New Letter	×
B <i>I</i> <u>U</u> <> <u>H</u> <u>H</u> ₂ # <u>H</u>	Add to Package
A to Control C	loc Canol

6. Click **"eSign"** bottom right corner to send the Proposal to the customer.

The cover letter is now first in the package.

NOTE: the Proposal will be sent through the system to the customer via a non-reply email with your information in the body of the email.

Click "Wet Sign" to print the proposal. If this option is chosen *no need to use additional steps below.*

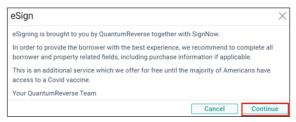
Add Document 🖍 Write Cover Letter				Deselect
Name	+ Added by / Modified by / Removed by	+ Document Type	+ Signers	Action
New Letter		Cover Letter		Edit 🗙
ist of Counselors Providing HECM Counseling		Counseling Agencies List	JM	
Fotal Annual Loan Cost Rate		TALC	JM	
Amortization Schedule		Amortization Schedule	JM	
Comparison		Comparison	JM	
Estimate of Closing Costs		Estimate of Closing Costs		



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eSign continued:

A pop-up window will appear regarding using SIgnNow, click the "Continue" button

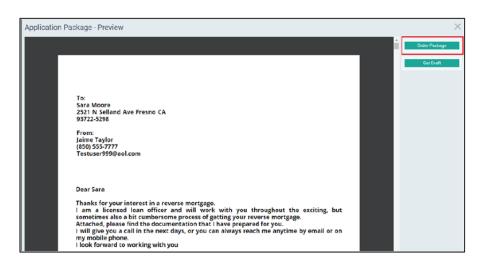


7. Enter the email for the customer and loan officer if they do not auto-populate.

Then click "Preview Document"

igners unction	\sim		
	Name	Email	
oan Officer	Jaime Taylor	Testuser999@aol.com	
lorrower	Sara Moore	saraMoore@fake.com	
et Sign Docum	nents		Why are these documents not eSignable?
No eSigning			
Loan Source Forr			
Social Security N	lumber Release Verification (S	(SA-89)	
Sign Document	ts		
Loan Officer, Bor	rrower		Add External Document Help
Cover Letter			
Submission Chec	cklist		
TALC			
	cies List		
Counseling Agen	eling Agency Information		

8. Click "Order Package"



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9. Click "Send eSign Invitation to Signers"



The system will process the request.

-	
eSign Documents are being prepared Please do not close this Browser window!	

Once completed, the system will provide confirmation. Click "Close"

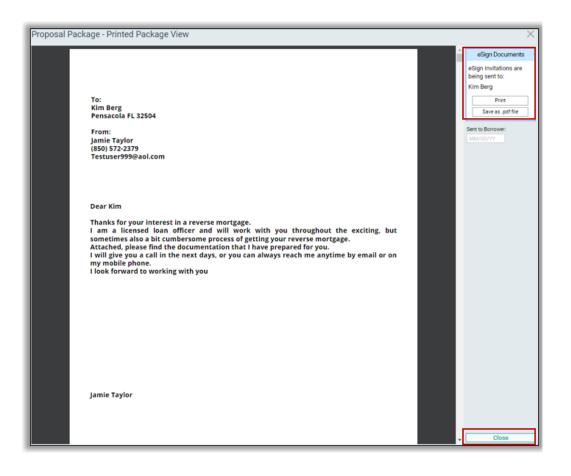
Note The email will be sent through the system from Quantum via non-reply email with your information in the body of the email.

eSign invitation emails are being sent	\times
You can facilitate the eSigning process by contacting the signers and let then that they will receive eSign requests by email. • Borrower, Kim Berg: 1 email request	n know
[Close



10. You can now chose to:

- Print the document
- Save the document
- Close the window and return to the Dashboard





Note:

- Signed Proposals are state specific; please check your state guidelines:
- When the Proposal has been signed by the borrower and sent back to Quantum, the signature verification in the tracker will only display 90%.
- The 90% warning does not hinder the process, and you can move forward with the loan.

Document Tracking			
Proposal			
> Printed Packages			
✓ Documents			
Proposal	Step	Progress	Actions
eSign Certificate of Completion	Identified		90 %
Preparing for Your Counseling Session	eSigned		90% View Printed View Scanned
Amortization Schedule	eSigned		90% View Printed View Scanned
TALC	eSigned		90% View Printed View Scanned
Comparison	eSigned		90% View Printed View Scanned
Choice of Insurance	eSigned		90% View Printed View Scanned
Counseling Agencies List	eSigned		90% View Printed View Scanned
Estimate of Closing Costs	eSigned		90% View Printed View Scanned
Proposal - Traditional	Requested		0% View Printed
Reverse Mortgage Self-Evaluation Checklist	Requested		0% View Printed
Counseling Access Code	eSigned		90% View Printed View Scanned

The loan card will remain in "Prospect status" until the Counseling Certificate has been uploaded. At which time it will change to "Origination".

MENTS	
VIENTS	
2:	04/14/2022
hit:	\$188,784
st:	Molly
HECM CMT	Monthly 10%
mount:	\$456,000
	Traditional
1	ly cmt2.875%
	\$17,323
16 PM	ly cr

10,054,485 MO Origination	2
LOAN DOCUMENTS	
Closing Date:	04/14/2022
Principal Limit:	\$188,784
Borrower First:	Molly
Product: HE	CM CMT Monthly 10%
Max Claim Amount:	\$456,000
Purpose:	Traditional
Index:	1y cmt2.875%
Upb:	\$17,323
8/26/2022 01:38 PM	
Proposal Package Created	

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