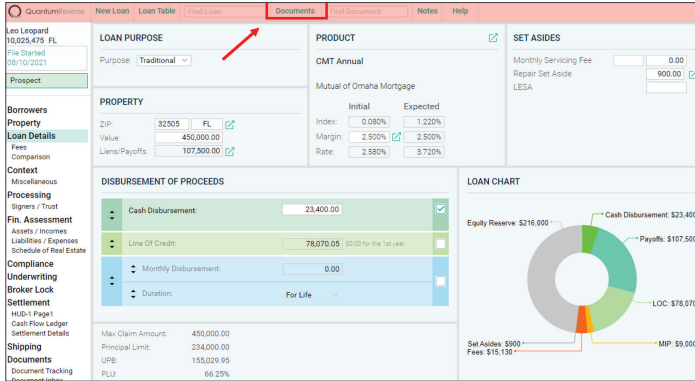
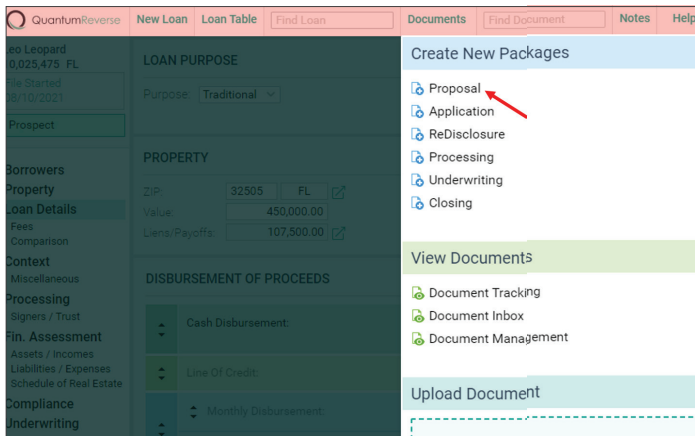


# Generating a Proposal

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

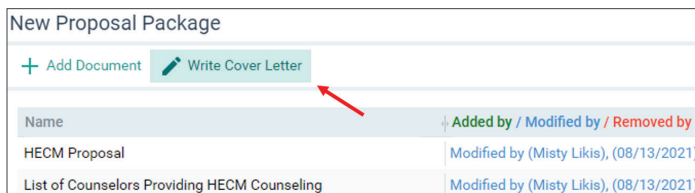


2. Select "Proposal."

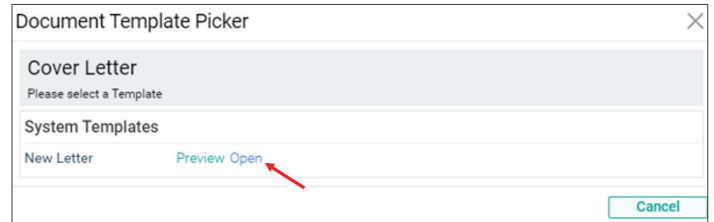


3. Click the "Write Cover Letter" to add a Cover Letter. (Cover letters are automatically created by Mutual of Omaha using your contact information. If changes are needed, please reach out to your AE).

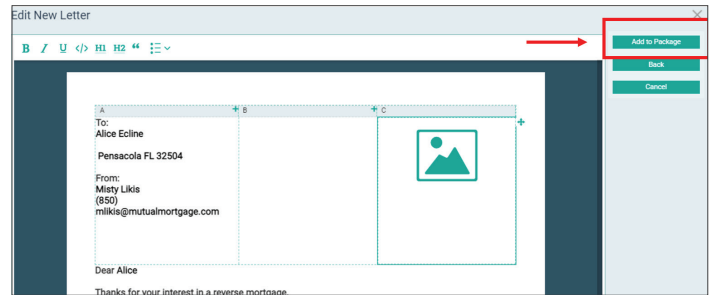
**Note: The screen will display the documents stacking order associated with the Proposal.**



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



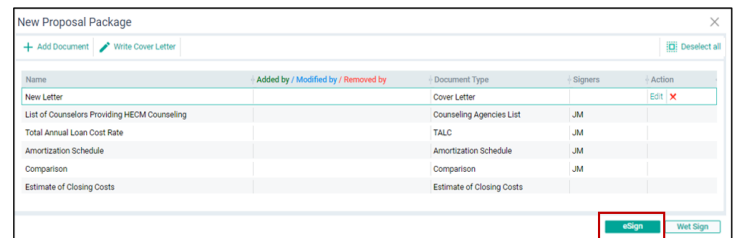
5. Click "Add to Package" to add the cover letter to the Proposal. If revisions need to be made, please reach out to your AE.



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.

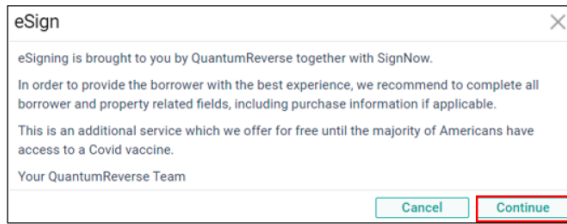
Click "Wet Sign" to print the proposal. If this option is chosen *no need to use additional steps below.*



# Generating a Proposal

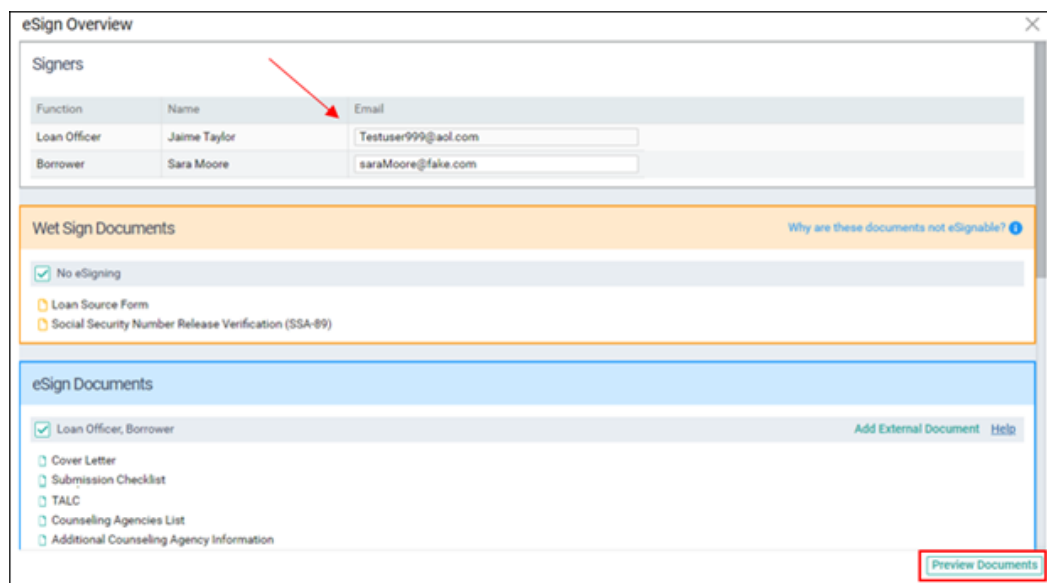
eSign continued:

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

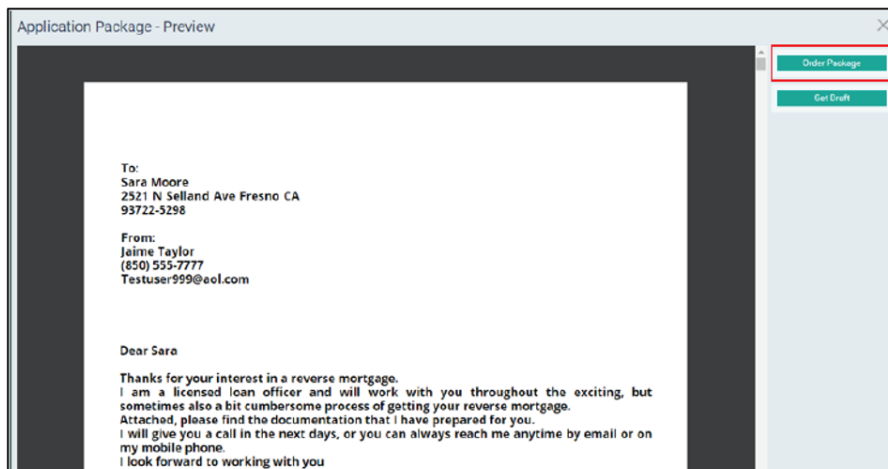


7. Enter the email for the customer and loan officer if they do not auto-populate.

Then click "Preview Document"



8. Click "Order Package"

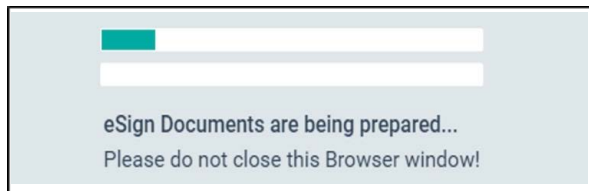


# Generating a Proposal

9. Click "Send eSign Invitation to Signers"

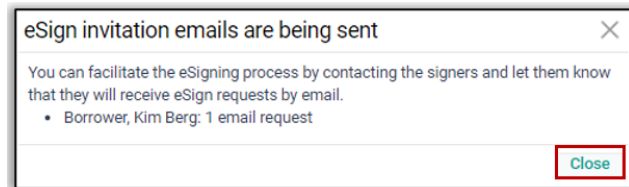


The system will process the request.



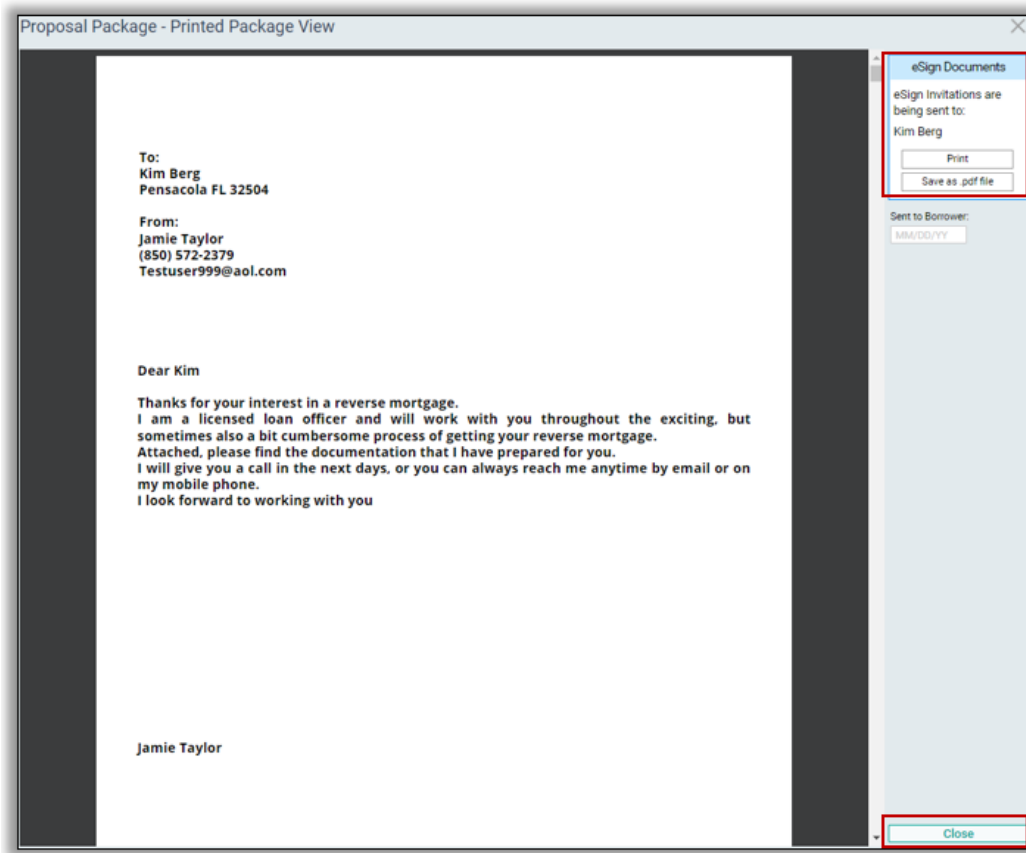
Once completed, the system will provide confirmation. Click "Close"

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



# Generating a Proposal

10. You can now chose to:
- Print the document
  - Save the document
  - Close the window and return to the Dashboard



# Generating a Proposal

## 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			
<a href="#">Printed Packages</a>			
<a href="#">Documents</a>			
Proposal	Step	Progress	Actions
eSign Certificate of Completion	Identified	<div style="width: 90%;"><div style="width: 90%;"></div></div> 90 %	
Preparing for Your Counseling Session	eSigned	<div style="width: 90%;"><div style="width: 90%;"></div></div> 90 %	<a href="#">View Printed</a> <a href="#">View Scanned</a>
Amortization Schedule	eSigned	<div style="width: 90%;"><div style="width: 90%;"></div></div> 90 %	<a href="#">View Printed</a> <a href="#">View Scanned</a>
TALC	eSigned	<div style="width: 90%;"><div style="width: 90%;"></div></div> 90 %	<a href="#">View Printed</a> <a href="#">View Scanned</a>
Comparison	eSigned	<div style="width: 90%;"><div style="width: 90%;"></div></div> 90 %	<a href="#">View Printed</a> <a href="#">View Scanned</a>
Choice of Insurance	eSigned	<div style="width: 90%;"><div style="width: 90%;"></div></div> 90 %	<a href="#">View Printed</a> <a href="#">View Scanned</a>
Counseling Agencies List	eSigned	<div style="width: 90%;"><div style="width: 90%;"></div></div> 90 %	<a href="#">View Printed</a> <a href="#">View Scanned</a>
Estimate of Closing Costs	eSigned	<div style="width: 90%;"><div style="width: 90%;"></div></div> 90 %	<a href="#">View Printed</a> <a href="#">View Scanned</a>
Proposal - Traditional	Requested	<div style="width: 0%;"><div style="width: 0%;"></div></div> 0 %	<a href="#">View Printed</a>
Reverse Mortgage Self-Evaluation Checklist	Requested	<div style="width: 0%;"><div style="width: 0%;"></div></div> 0 %	<a href="#">View Printed</a>
Counseling Access Code	eSigned	<div style="width: 90%;"><div style="width: 90%;"></div></div> 90 %	<a href="#">View Printed</a> <a href="#">View Scanned</a>

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

Molly Ringwald  
10,054,485 MO 2

Prospect

**LOAN DOCUMENTS**

Closing Date: 04/14/2022  
Principal Limit: \$188,784  
Borrower First: Molly  
Product: HECM CMT Monthly 10%  
Max Claim Amount: \$456,000  
Purpose: Traditional  
Index: 1y cmt2.875%  
Upb: \$17,323

8/26/2022 01:26 PM  
Proposal Package Created

Molly Ringwald ×

10,054,485 MO 2

Origination ⚙️

**LOAN DOCUMENTS**

Closing Date: 04/14/2022  
Principal Limit: \$188,784  
Borrower First: Molly  
Product: HECM 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