



## Mike Stoneking

Sr. Loan Consultant

(909) 920-5260

(800) 566-2475

NMLS #247867

[www.HLCteam.com](http://www.HLCteam.com)



Mike Stoneking & his team at Broadview Mortgage would like to introduce a new, efficient, & easy way to stay up-to-date on your important transactions...

# EyeOnMyLoan

Please scroll to go to the next slide



# EyeOnMyLoan

EyeOnMyLoan makes it easy to stay up-to-date on your transactions. Here is a brief introduction and instructions on how to use this new tool.

Please scroll to go to the next slide

# Getting Started

- You were recently sent (or will soon receive) an email that looks like the one below giving you your user name and password for Eye On My Loan. This is the first step in joining, so if you have not received an email, please check your spam folders for any email from Eye On My Loan. If you still cannot locate the initial email, please give us a call. (909) 920-5260

## Brooke Irish

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**From:** admin@eyeonmyloan.com  
**Sent:** Friday, September 26, 2008 2:52 PM  
**To:** Brooke@broadviewmortgage.com  
**Cc:** Tim@hlcteam.com  
**Subject:** Your EyeOnMyLoan account has been created.

**Hello Brooke Irish,**

*A mortgage consultant you work with has just set you up* on EyeOnMyLoan. EyeOnMyLoan is a real time proactive approach that helps your mortgage consultant keep you updated on the status of a loan. As the loan transaction you are involved in progresses, you will be notified via email. In addition, key documents will be posted on the website.

Below is your login information:

Username: Brooke@broadviewmortgage.com  
Password: \*\*\*\*\* (in your email, this will show our actual password)  
Website: <http://www.eyeonmyloan.com>

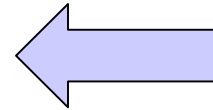
Please save this email for future reference. You can login in any time to check the status of current loans, and to update your contact information.

**PLEASE DO NOT** reply to this email. This is an automated email notification. To reply to a Mortgage Consultant please login to EyeOnMyLoan by going to [www.eyeonmyloan.com](http://www.eyeonmyloan.com).

*This e-mail is pertinent to your closing transactions. Please login to view the loan status and make sure the loan information is correct.*

**Thank you!**

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On this slide and all others,  
Click on Screen Shot for a  
Full-Page Example

Please scroll to go to the next slide

# Logging In

- Open your browser and visit [www.EyeOnMyLoan.com](http://www.EyeOnMyLoan.com)
- A screen like the one below will appear. Log in using the user name and password given to you in the initial email. Your user name should be your email address.
- If you have any trouble logging in, please give us a call.

The screenshot shows the EyeOnMyLoan website. At the top left is the logo and contact information: EyeOnMyLoan, 2921 E Fort Lowell Road, Suite 105, Tucson, AZ 85716, sales: 1.866.966.6671, support: support@eyeonmyloan.com. A navigation bar includes Home, Login, and Support. Below this is a main menu with Home, Products, Testimonials, Sign-Up, About Us, and Contact Us. The main content area features a banner with a man's image and the text "Created by Loan Officers for Loan Officers", listing "Technology that makes your job easier" and "Effortless Marketing". To the right is a "Welcome to EyeOnMyLoan" message. Below the banner are three columns: "Our Products" (Streamline your business. Catapult to the next level. Learn More >>), "Pricing Options" (Available Packages to suit your business needs. Learn More >>), and "What Our Customers Say" (Loved the daily e-mail communication ... Read More >>). A dark blue box says "Already a member? sign in below" with a downward arrow. Below that is a "Secure Login" section with fields for Username and Password, a Login button, and a link for "Not a member? Sign Up Today! >>". A green arrow points to the Login button. At the bottom, there is a footer with "HOME | PRODUCTS | TESTIMONIALS | SIGN-UP | ABOUT US | CONTACT US", copyright information, and "Powered By Vision7 Software".

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# Viewing Loans

- Once you log in, a screen like the one below should show the details of your most current transaction. On this screen, you will be able to see when certain aspects of the loan were completed. You will also be able to see the information for everyone involved in the transaction, such as the escrow agent.




## This is the "Dashboard"

You will find all the loan contact information as well as purchase price, closing date, and loan progress. If you would like to print this for faxing, just click on "Display Printable View" at the bottom of the page.

Available Loans: **Loan Team** | Profile

| Process Steps |   |           | Loan Details                               |
|---------------|---|-----------|--|
| Step          | Description                             | Completed |  |
| 1             | Loan application taken & credit pulled  | 9/15/2008 | 1234 Sample<br>Claremont, California 91711 |
| 2             | Automated Underwriting Approval         | 9/15/2008 | Sales Price: <b>\$400,000</b>              |
| 3             | Escrow Received                         | 9/15/2008 | Closing Date: 10/30/2008                   |
| 4             | Appraisal ordered                       | 9/15/2008 | Status: <b>Active</b>                      |
| 5             | Appraisal received                      | 9/17/2008 |  |
| 6             | Loan is Locked                          | 9/18/2008 |  |
| 7             | File has been submitted to underwriting | 9/20/2008 |  |
| 8             | Conditional loan approval               | 9/21/2008 |  |
| 9             | Closing docs sent to escrow company     |           |  |
| 10            | Closing docs received at funding        |           |  |
| 11            | Funding Conditions                      |           |  |
| 12            | Loan has funded - Thank You!            |           |  |

| Professional Contacts  |  |
|--|--|
| <b>Selling Agent</b><br><br>Sample Kristin<br>Realtor<br>Sample Realty<br>1234 Sample Realty Street<br>Claremont, California 91711<br>Business Phone: (909) 920-8260<br><a href="mailto:ks@broadviewmortgage.com">ks@broadviewmortgage.com</a>   | <b>Listing Agent</b><br><br>Brooke Irish<br>Realtor<br>Sample Realty<br>1234 Sample Realty Street<br>Claremont, California 91711<br>Business Phone: (909) 920-8260<br><a href="mailto:Brooke@broadviewmortgage.com">Brooke@broadviewmortgage.com</a> |
| <b>Mortgage Consultant</b><br><br>Tim Harrison<br>Branch Manager<br>Broadview Mortgage<br>1164 N. Monte Vista Suite 4<br>Upland, California 91788<br>Business Phone: (909) 920-8260<br>Business Fax: (800) 944-8188<br>Home: (909) 380-9232<br><a href="mailto:Tim@hicteam.com">Tim@hicteam.com</a><br><a href="http://www.hicteam.com">www.hicteam.com</a> | <b>Escrow Officer / Attorney</b><br><br>Linda Martinez<br>Escrow Officer<br>Sample Backrow<br>Business Phone: (909) 920-8260<br><a href="mailto:linda@broadviewmortgage.com">linda@broadviewmortgage.com</a>  |
| <b>Loan processor</b><br><br>Monica Moraga<br>Processor<br>Broadview Mortgage<br>1164 N. Monte Vista Suite 4<br>Upland, California 91788<br>Business Phone: (909) 920-8260<br>Business Fax: (800) 944-8188<br><a href="mailto:Monica@hicteam.com">Monica@hicteam.com</a><br><a href="http://www.hicteam.com">www.hicteam.com</a>                            |  |

| Process Notes                     | Loan Documents   |
|-----------------------------------|--|
| No notes available for this loan. | <a href="#">View Documents</a><br>10/8/2008<br><a href="#">Download Document</a><br>10/8/2008<br><a href="#">Download Document</a><br>9/29/2008<br><a href="#">Download Document</a> |

[\[Display Printable View\]](#)

[Back] [Logout]

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[CONTENT]

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# Viewing Loans (continued)

- If the screen comes up differently or if you navigate away from the initial page, you can always access your available loans by clicking on the "Available Loans" tab.
- If you wish to search for a closed loan, you can use the "Loan Search" tab.



**BROADVIEW**  
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[www.HLCTeam.com](http://www.HLCTeam.com)

**This screen allows you to view all the loans available in your pipeline.**

From this screen you can view a loan, edit the process steps for the loan, or adjust the details of a loan. Hint: this page shows only loans in an active status. If you need to find an old loan.....go to [loan search](#).

**Available Loans** | [Loan Search](#) | [Profile](#)

The following mortgages matched your search criteria:

| Name          | Address     | City      | Type     | Sales Contract Price | Closing    |                      |
|---------------|-------------|-----------|----------|----------------------|------------|----------------------|
| Irish, Brooke | 1234 Sample | Claremont | Purchase | \$400,000            | 10/30/2008 | <a href="#">View</a> |

[Logoff]

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[CONTENT]

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# Viewing Documents

- On the loan screen, you can scroll down for documents on the loan. Only the borrower and selling agent will be able to view the appraisal. They can do so by clicking on the "Appraisal.pdf" link in the bottom right corner.
- Any documents available to you, such as the Loan Approval, Funding Condition List, Good Faith Estimate, etc. will be available in the bottom right corner of this screen.

Business Phone: (905) 920-5200  
[linda@broadviewmortgage.com](mailto:linda@broadviewmortgage.com)

**Loan Documents**  
[Upload Documents](#)

10/6/2008  
[LoanApproval.pdf](#)

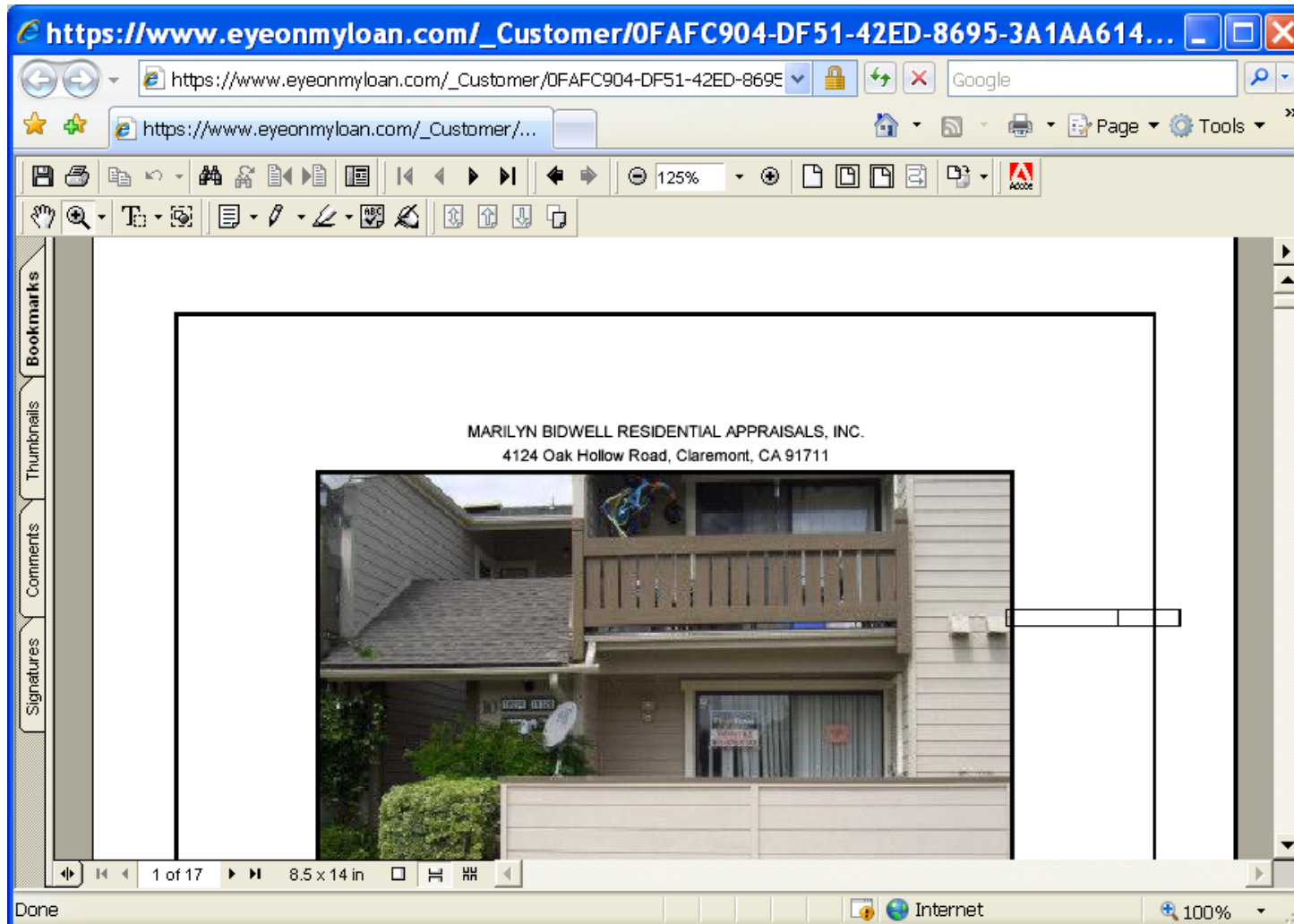
9/29/2008  
[Appraisal.pdf](#)

[Printable View](#)

Please scroll to go to the next slide

# Viewing Documents (continued)

- After the borrower or selling agent clicks on the "Appraisal.pdf" link, or any other document, it will appear in a pop-up window.



Please scroll to go to the next slide

# Viewing Funding Conditions

- You can view the Funding Conditions the same way you view the appraisal.
- This allows you to see exactly what we are waiting on to close the loan.



## Funding Conditions

|                 |  |
|-----------------|--|
| Date: 9/29/2008 | Loan Number:                             |
| Borrower:       | Funder: Lynda Edwards                    |
| Property:       | Loan Officer: Tim Harrison               |
| Escrow Company: | Anticipated Closing Date: 09/30/08       |
| Escrow Contact: | All Conditions to Funding Dept: 09/29/09 |
| Escrow Number:  |  |
| Escrow Address: |  |
| Escrow Phone:   |  |
| Escrow Fax:     |  |

**This is a sample, so Escrow and Borrower information is not disclosed.**

### Escrow to Provide/Funder to Review

- Documentation showing signer has authority to represent seller - DEUTSCHE BANK TRUST TO ASSETLINK SERVICE LP AS ATTORNEY IN FACT FOR SAXON MORTGAGE\_\_x\_\_LIST OF AUTHORIZED SIGNORS \_\_\_\_\_
- Certified copies of initial deposit check & receipt for \$2200.00 \_X\_ ; final escrow deposit receipt & checks or wires \_X\_ \*\*ADDED 9/29/08\*\* - NEED THE COPY OF THE ACTUAL INCOMING WIRE FOR \$25,640.59 \_\_\_\_\_
- Hazard insurance \_\_\_ flood insurance \_NA\_ adequate to replace the dwelling or the loan amount whichever is less. Est. HUD-1 must show the annual premium paid through closing \_\_\_ Premium Included in HOA fee.
- FHA loan approved with buyer paying a minimum of \$25150. down payment, and closing costs. Additional closing costs of \$5000. paid by Seller. Cash back to buyer cannot exceed initial deposit of \$ . Refund any excess to lender for principal reduction.
- Prior to disbursing any funds to the borrower or seller, we require a copy of the draft Final HUD-1 and a copy of the title company invoice showing the actual fees for the title policy and recording fee for the deed of trust. These must be audited by us prior to disbursement to insure all fees and credits are properly allocated per our previous instructions to you and to confirm that the borrower is making the required minimum investment in the property. Please email both items to bmcroadviewmortgage.com or fax them to 714-783-3079 and we will audit the information and return it to you in 4 hours or less.

### Lender's Funder to Complete

- Final 1003 corrections for case # and correct MIP and monthly based on when case # ordered. Also omit reo address in REO section on page 3 of 1003
- Verbal VOE completed by funder confirming B1 \_\_\_ B2 \_\_\_ still employed.
- FHA Case# \_\_\_x\_\_ printout CAIVR# B1 \_X\_ B2 \_X\_. Evidence property type corrected via FHA Connection as 234 NOT 203

# Update Emails

- You will receive an update email at different points throughout the transaction. These will look like the screen pictured below.
- We urge you to visit the site when you receive these emails. You can only access documents through the site.

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**To:** Kristin@broadviewmortgage.com  
**Subject:** Loan status has been updated for Brooke Irish (1234 Sample )

Hello Sample Kristin,

**ACTION REPORT**

The loan status has changed. Below is a detailed list of actions that have been performed and what is left to follow.

Please *click on the link below* so you can see further details of the loan. Once logged in, take a look in the **DOCUMENT** section to find things like: conditional loan approval (CLA), good faith estimate, appraisal, closing statement and more.

**Borrower and Property Information**

Borrower Name: Brooke Irish  
Subject Property Address: 1234 Sample  
Claremont, California 91711  
Contract Close Date: 10/30/2008  
Contract Sales Price: \$400,000.00

**Loan Status**

| Step | Description                             | Completed |
|------|---|-----------|
| 1    | Loan application taken & credit pulled  | 9/15/2008 |
| 2    | Automated Underwriting Approval         | 9/15/2008 |
| 3    | Escrow Received                         | 9/15/2008 |
| 4    | Appraisal ordered                       | 9/15/2008 |
| 5    | Appraisal received                      | 9/17/2008 |
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| 11   | Funding Conditions                      |           |
| 12   | Loan has funded - Thank You!            |           |

[Click here](#) for current status of this loan.

Sincerely,  
Tim Harrison

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Please scroll to go to the next slide

# Changing Your Contact Information

- Once you receive the initial email and log in, your EyeOnMyLoan account is completely under your control.
- You can change your contact information by clicking on the “Profile” tab and editing any of the fields.



## This page manages all profile information.

Using this page you can manage all contact information. This screen allows you to reset your password, manage your address and phone numbers. In addition, you can upload a picture to be utilized on your “Dashboard”. **Hint:** can also add a link from your personal website to EyeOnMyLoan.

Account Profile

Account Settings

Username: Kristin@broadviewmortgage.com

New Password:

Confirm Password:

Profile Photo

Note: The photo added to your profile will be resized automatically. To make them look better you should upload them exact to 100px wide. This photo will be displayed next to your contact information on the loan screen.




Photo Requirements:

- JPEG Image
- RGB Format
- 72 dpi resolution
- 70px wide

Remove This Photo

New Photo Upload:

Name Details

Display Name: Sample Kristin

First Name:

Middle Initial:

Last Name:

Company:

Title:

Website:

Address Details

Address 1:

Address 2:

City:

State:

Postal Code:

Contact Details

Phone:

Fax:

Mobile:

EMail:

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- You can change and update all of your contact information and picture at any time and when you do, the updates carry over to the entire EyeOnMyLoan system. This means that if you are using another lender who uses EyeOnMyLoan, they have access to your updated contact information. The same goes for your client! So, in a few years, when your client is looking for a bigger home, they can still get a hold of you, even if you've changed companies!
- You can have updates go to your assistant's email instead of yours.

Please scroll to go to the next slide

We hope you enjoy this new tool. It will be a beneficial resource for all parties and we will be using it on all of our transactions. If you have any issues whatsoever, please contact us.



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