



**Tim Harrison**

Branch Manager

(909) 920-5252

(800) 566-2475

NMLS #170960

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



Tim Harrison & his team at Broadview Mortgage would like to introduce a new, efficient, & easy way to stay up-to-date on your loan...

EyeOnMyLoan

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# EyeOnMyLoan

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

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# Getting Started

- You were recently sent (or will soon receive) an email that looks like the one below letting you know that your loan has been added to EyeOnMyLoan. 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

## Your EyeOnMyLoan account has been created. Inbox | X

☆ [admin@eyeonmyloan.com](mailto:admin@eyeonmyloan.com) to me show details Sep 26 (11 days ago) Reply

Hello Brooke Irish,

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

You have recently been setup on EyeOnMyLoan. EyeOnMyLoan is a real time proactive approach that helps your mortgage consultant keep you updated on the status of a loan.

Below is your login information:

Username: [irish.brooke.k@gmail.com](mailto:irish.brooke.k@gmail.com)  
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 <http://www.eyeonmyloan.com>.

Thank you!



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

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# 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 given to you in the initial email. You will not yet have a password, so just leave that field blank.
- 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 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" with bullet points: "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" form with fields for Username and Password, and a Login button. A green arrow points to the Password field. At the bottom, there are links for "Review the Product >>" and "Sign Up Today >>". The footer contains copyright information and "Powered By Vision7 Software".

Please scroll to go to the next slide

# Viewing Loans

- Once you log in, a screen like the one below should show the details of your loan. 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, processor, and listing agent.
- Please note that you should never contact the listing agent directly. Your selling agent is your representative and they will contact the listing agent for you with any needs or concerns.



## 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 [View Loans](#) [Home](#)

Process Steps			Loan Details
Step	Description	Completed	
1	Loan Application taken & credit pulled	9/15/2008	1224 53rd Ave Claremont, California 91711
2	Automated Underwriting Approval	9/15/2008	Sales Price: \$400,000
3	Escrow Received	9/15/2008	Closing Date: 10/30/2008
4	Appraisal ordered	9/15/2008	Status: Active
5	Appraisal received	9/17/2008	
6	Loan is Under	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!		

**Borrower Information**  
Brooke Irish  
Irish.Brooke.K@icim.com

**Professional Contacts**

<p><b>Selling Agent</b></p>  <p>Sample Kristin Realtor Sample Realty 1234 Sample Realty Street Claremont, California 91711 Business Phone: (909) 920-1230 K.Kristin@broadviewmortgage.com</p>	<p><b>Listing Agent</b></p>  <p>Brooke Irish Realtor Sample Realty 1234 Sample Realty Street Claremont, California 91711 Business Phone: (909) 920-1230 B.Irish@broadviewmortgage.com</p>
<p><b>Mortgage Consultant</b></p>  <p>Tim Harrison Branch Manager Broadview Mortgage 1184 N. Home Vista Suite 4 Upland, California 91786 Business Phone: (909) 920-1230 Business Fax: (909) 944-8138 Home: (909) 340-1232 Tim.H@icim.com www.HiCitem.com</p>	<p><b>Escrow Officer / Attorney</b></p>  <p>Linda Martinez Escrow Officer Sample Escrow Business Phone: (909) 920-1230 L.Martinez@icim.com</p>
<p><b>Loan processor</b></p>  <p>Monica Moraga Processor Broadview Mortgage 1184 N. Home Vista Suite 4 Upland, California 91786 Business Phone: (909) 920-1230 Business Fax: (909) 944-8138 Monica.M@icim.com www.HiCitem.com</p>	

**Process Notes**  
No notes available for this loan.

**Loan Documents**  
[2008-1 Documents](#)  
[10/15/2008](#)  
[Escrow-2008-10-15-2008.pdf](#)  
[10/19/2008](#)  
[Escrow-2008-10-19-2008.pdf](#)  
[10/29/2008](#)  
[Escrow-2008-10-29-2008.pdf](#)

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

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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. You 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: (909) 920-0200  
[linda@broadviewmortgage.com](mailto:linda@broadviewmortgage.com)

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

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

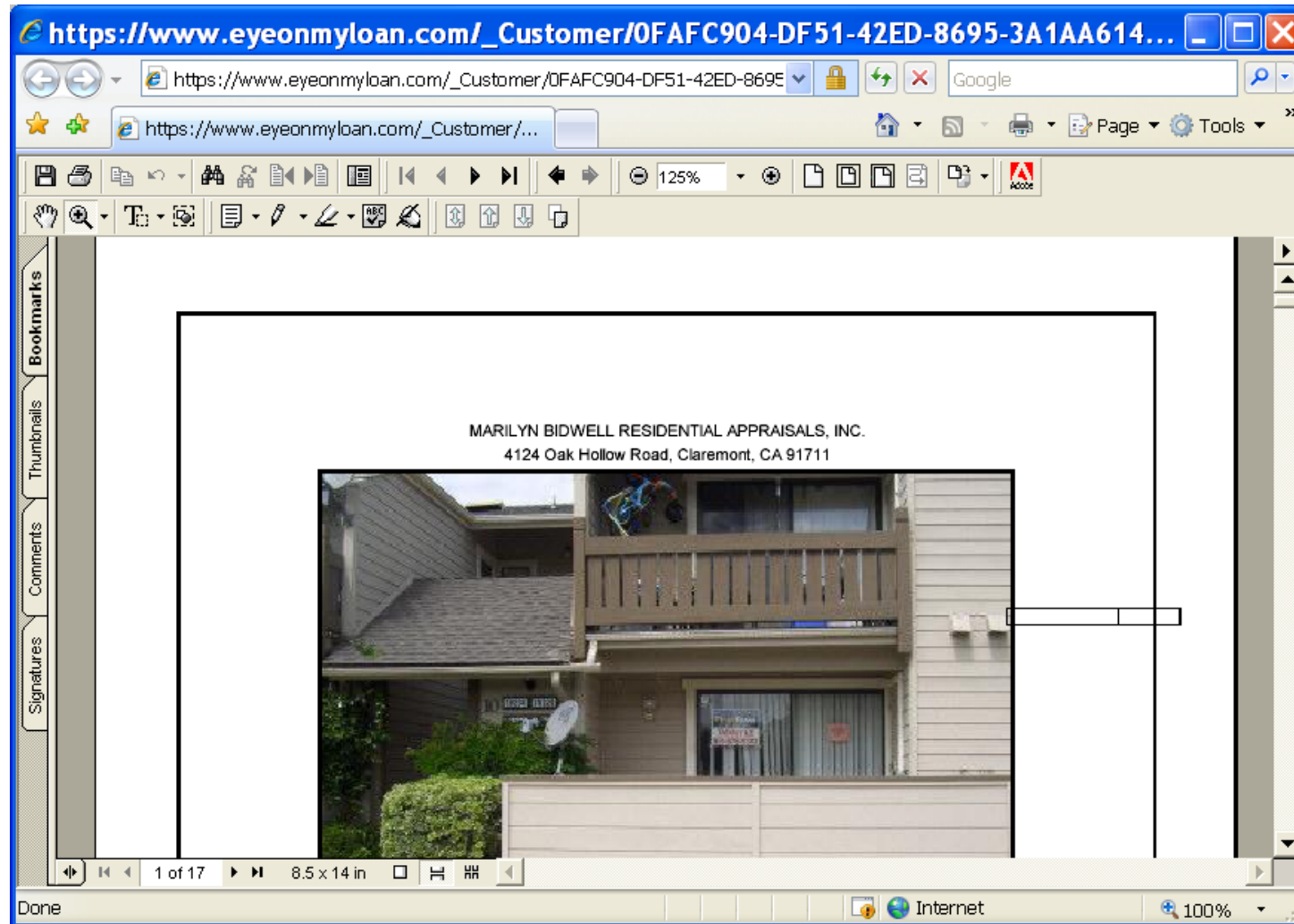
9/29/2008  
[Appraisal.pdf](#)

[Printable View](#)

Please scroll to go to the next slide

# Viewing Documents (continued)


- After you click on the "Appraisal.pdf" link, or any other document, it will appear in a pop-up window.



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# 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.

**BROADVIEW MORTGAGE CORP**  
*Mortgage Bankers*

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**Funding Conditions**

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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.**

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**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 inHOA 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](mailto: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

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BV\_funding\_conditions.rpt2200 W Orangewood Ave Ste 215, Orange, CA, 92868  
Phone: 714-939-0100 Fax: 714-940-1970  
Email: [funding-retail@broadviewmortgage.com](mailto:funding-retail@broadviewmortgage.com)Page 1 of 1

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# 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
6	Loan is Locked	9/15/2008
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!	

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

Sincerely,  
Tim Harrison

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# Changing Your Contact Information and Creating a Password

- 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.**

The screenshot shows a web form titled "Account Profile" with a navigation bar at the top containing "Available Loans", "Loan Search", and "Profile". The form is divided into several sections: "Account Settings" with fields for Username (Kristin@broadviewmortgage.com), New Password, and Confirm Password; "Profile Photo" with a photo of a woman, a "Remove This Photo" checkbox, and a "Browse" button; "Name Details" with fields for Display Name (Sample Kristin), First Name (Sample), Middle Initial, Last Name (Kristin), Company (Sample Realty), Title (Realtor), and Website; "Address Details" with fields for Address 1 (1234 Sample Realty Street), Address 2, City (Claremont), State (California), and Postal Code (91711); and "Contact Details" with fields for Phone ((809) 920-5200), Fax, Mobile, and Email (Kristin@broadviewmortgage.com). A green arrow points to the "Confirm Password" field. An "Update" button is at the bottom of the form.

[\[back\]](#) [\[Logout\]](#)

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- To change your password (which you should do on your first visit), type in a password and confirm it, then press “Update” at the bottom of your screen. From then on, you will need to enter your email address and personally selected password when logging in to check the status of your loan.
- 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.
- You can have updates go to your spouse’s email instead of yours if you wish.

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 look forward to using it on all of our transactions. If you have any issues whatsoever, please contact us.



(909) 920-5260

(800) 566-2475

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

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