



INTRODUCING: LOANVIEW CONNECT



LoanView Connect is a powerful, comprehensive tool for lenders that allows companies to rebuild loan officer customer databases from January 1, 2019 to present. Diminish onboarding hassle and avoid litigation exposure by accessing LoanView Connect's loan level, closed transaction details and contact information by loan officer, at scale.

LoanView Connect addresses key challenges and opportunities with a wealth of features that streamline operations and enhance business development strategies:

1. Recruitment Efficiency: By providing access to loan officer databases, LoanView Connect simplifies the recruiting process for companies. This eliminates the need for loan officers to manually transfer their databases, increasing accuracy, and reducing friction or potential disputes during the recruitment and transition processes.

2. Community Reinvestment Act (CRA) Compliance and Fair Lending Efforts: LoanView Connect facilitates efforts to comply with the Community Reinvestment Act and advance fair lending practices. The ability to search for and market to borrowers in low-to-moderate income (LMI) and majority minority census tracts (MMCTs) helps lenders demonstrate their commitment to serving underserved communities and promotes financial inclusion.

3. Wealth Management Program Development: Targeting high net worth borrowers is made easier with LoanView Connect's wealth management-based program capabilities. With the InGenius platform, lenders can target loan officers who work with high net worth consumers using loan amount search parameters. This allows banks to market private client services and earn their deposits using loan officers' databases.

Tap into LoanView Connect's detailed transaction information to enhance operational efficiency, and develop targeted business strategies across various aspects of lending operations.

Scan the QR code to download our eBook, *Mortgage Recruiting in a New Era*:

**THE POWER OF
DYNAMIC DATA**





INGENIUS BUSINESS DEVELOPMENT:

Real Estate Agent Analytics & Relationships



Prospect for Realtor partners in your market and decide which relationships to pursue - or keep.

InGenius users get immediate ROI in the form of saved time and effort and long-term benefit from accurate data that provides simplicity in a complex business.

Use InGenius real estate agent analytics to find out:

- Agents' closing volume segmented by side types (listings, buy side, and dual side)
- Real Estate brand, office, and agent to builder production relationships
- Geographic service area (national, state, metro market, county, and city)
- Insight into business relationships and activities between lenders, agents and offices
- Loan product mix, units and loan amounts of agents' transactions
- Which agents specialize in low-to-moderate income (LMI), majority minority census tract (MMCT) areas to enhance and expand your Fair Lending and CRA efforts

Searching is simple and streamlined with Dynamic Filters. InGenius' expansive filtering options allow users to create custom reports. Users can download or export data into their CRM (API optional) using a variety of file types.

In addition to superior accuracy and valuable filtering capabilities, InGenius data provides contact information that can load directly into your CRM with API option, allowing you to prospect easily, at scale.

InGenius Business Development is available for enterprises and individual brokers.

**Are you ready for high performance in your
business development efforts?**

It's time to get InGenius!



INGENIUS RECRUITING:

Identify, Recruit & Retain Best-Fit Loan Officers



Get amazing transparency into the lending landscape that allows you to meet production and profitability goals with effective recruiting and quality partner relationships.

InGenius data eliminates manual labor and saves valuable time with our highly accurate data that lets you easily and instantly review loan officers by:

- Funded loans history by year, quarter and month going back to 1/1/2019
- Lender, broker company, branch and loan officer production by units, volume, product mix, and loan purpose type
- Broker company to lender production and market share reports
- Funded loans in low-to-moderate income (LMI), majority minority census tract (MMCT) areas to enhance and expand your Fair Lending and CRA efforts
- Builder production relationships filtered by lenders, broker companies, and loan officers
- Reduce your overall data spend with InGenius' robust data consolidated into one platform, eliminating the need for multiple sources and costs

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In addition to superior accuracy and valuable filtering capabilities, InGenius data provides contact information that can load directly into your CRM with API option, allowing you to prospect easily, at scale.

Are you ready for high performance in your recruiting efforts?

It's time to get InGenius!

THE INGENIUS APPROACH: DIVERSE & UNDERSERVED MARKETS

Fulfill Fair Lending, Community
Reinvestment and Mission-Driven Goals



Diverse and underserved markets offer a tremendous growth opportunity. You can build, expand and improve your production in these areas by finding professionals with proven track records specializing in this type of business.

InGenius data eliminates manual labor and saves valuable time with our highly accurate data that lets you easily and instantly review loan officers by:

- Funded loans in low-to-moderate income (LMI), majority minority census tract (MMCT) areas
- Lender, broker company, branch and loan officer production by units, volume, product mix, and loan purpose type
- Funded loans history by year, quarter and month going back to 1/1/2019

Search & review real estate agents and brokerages:

- Agents' closing volume segmented by side types (listings, buy side, and dual side)
- Real Estate brand, office, and agent to builder production relationships
- Geographic service area (national, state, metro market, county, and city)
- Insight into business relationships and activities between lenders, agents and offices
- Loan product mix, units and loan amounts of agents' transactions
- Which agents specialize in low-to-moderate income (LMI), majority minority census tract (MMCT) areas to enhance and expand your Fair Lending and CRA efforts

Searching is simple and streamlined with Dynamic Filters. InGenius' expansive filtering options allow users to create custom reports. Users can download or export data at scale and can use the data with any CRM (API optional) using a variety of file types.

InGenius allows you to reduce your overall data spend with InGenius' robust data consolidated into one platform, eliminating the need for multiple sources and costs.

In addition to superior accuracy and valuable filtering capabilities, InGenius data provides contact information that can load directly into your CRM with API option, allowing you to prospect easily, at scale.

**Are you ready for high performance and
expansion into diverse markets?**

It's time to get InGenius!