

BROKER PORTAL USER GUIDE



The Broker Portal is an exclusive platform that makes it even easier to do business with Caliber Home Loans. This user guide will provide details on what you can expect to see.

Benefits of using the Broker Portal include:

- Increased Productivity
- Streamlined processes to boost efficiency
- An overall improved broker experience

Check out these sections to learn more!

- Dashboard The landing page for the broker portal, and it has been designed to keep you informed on the latest information available while allowing you to be as efficient as possible.
- MyPipeline A robust, customizable, all-encompassing way to view and manage your pipeline effectively.
- Create a New Loan A redesigned process to allow for an intuitive step by step flow for creating new loans.
- Product & Pricing Provides a streamlined and more robust pricing and eligibility tool with dynamic fields based on inputs.
- My Account Settings Allows users to set up certain details about their account within the Broker Portal.
- Advanced Search Allows users to search for loans with additional field options.
- H20 Additional menus and options to make working on loans more efficient.
- <u>Caliber LE</u> Provides users a simplified and intuitive workflow for generating the Caliber LE.

Broker Portal: Logging In

To access the Broker Portal go to <u>blueprint.caliberwholesale.com</u> and enter your Caliber credentials.





Broker Portal: Dashboard

The **Dashboard** is the landing page for the broker portal, and it has been designed to keep you informed on the latest information available while allowing you to be as efficient as possible.

Action Tabs

Identify loans that have items to review, loans with upcoming deadlines, and loans with outstanding conditions that need to be resolved. **Loan Analytics**

Caliber Team

Displays the loans that have closed, are in underwriting, and that have funded MTD.

Provides contact information to your Account Executive (AE), direct manager, and support team members.

Turn Time

Current turn times for Loan Registration, Underwriting, Conditions, Initial CD, and Closing Docs for your Ops center.

My Pipeline	Welcome Back, S	iddhartha Roy				
	We need your help with 4444 item	ns.				
Create New Loan						
Product & Pricing Rate Sheet	1733 Items to Review	w 45 Upcoming	Deadlines 236	Loans with Outstanding Conditions	Loan Analytics	Month to Date
CaliberPRO	Loan Number	Borrower ¢	Required Actions 🗢	Lock Status	16	605
Training	9730804045 Purchase	Firstimer, Alice New Orleans,LA	Review Active Alerts & Stops +.1.more	A		In Underwriting
Manage Team	9735965874 Construction-Permanent	Firstimer, Jim BEVERLY HILLS,CA	Lock Loan ±.2.more	<u>م</u>	C264	N/A
	9707991015 Purchase	Firstimer, Alice New Orleans,LA	Review Active Alerts & Stops +.1.mgre	A	S2M Funded C	Company Ranking
	9754035906 Purchase	FACREDCOAZ, DOUG SANTA ANA,CA	Review Active Alerts & Stops	₽		
	9739073303 Purchase	Homeowner, John San Francisco,CA	Lock Loan +.2.more	₽	Earn your way into Cal	
	9700232755 Refinance	Firstimer, Alice SANTA ANA,CA	Review Active Alerts & Stops ±.1.mgre	-		arn More 🗹
	9741995477 Purchase	FIRSTIMER, ALICE BEVERLY HILLS,CA	Borrower To eSign LE + 2 more	-	Caliber Team	
	9737122912 Purchase	Firstimer, Alice Metairie,LA	Review Active Alerts & Stops +.2.more	-	Test Account Siddhartha Roy AE Account Executive (000) 000-0000	TASR
					Siddhartha.Roy@caliberdirecttesting.com	1
	Do you want to streamline pur	Ioans fast with Calik rchase loan closing and get your clients I Caliber Go is here to help you do just th	n their new homes with less		(000) 000-0000 Steve.Bovenzi.CaliberBlackHawkUAT1.chl@mailina	tor.com 🏼
	Caliber Go empowers you to d	close loans fast - in as little as 14 days.*			Dana Brooks Client Relations Specialist (000) 000-0000	DB
	Learn More				Dana.Brooks.scrub.chl@mailinator.com Daniel Luszowiak	
	*Some loan applications are not suite	ed for digital delivery of asset, income, employment	s, and other documentation required		Client Relations Manager (000) 000-0000	DL
	for loan approval. Processing and clos	sing times vary depending on the nature and comp	lexity of the transaction.		Daniel.Luszowiak.CaliberBlackHawkUAT1.chl@mai	linator.com
					Hide Full Team	
	Turn Times			View: Business Days	×	
	Turn Times	Underwriting	Conditions In	View: Business Days	~	
		Underwriting Business Days Refinance	Conditions In Business Days	· · · ·	~	
	Loan Registration Purchase Conventional FHA	Business Days Refinance 3 Conventional 3 Sprint		· · · ·		
	Loan Registration Purchase Conventional	Business Days Refinance 3 Conventional 3 Sprint 3 FHA 3 VA 3 USDA		· · · ·	~	
	Loan Registration Purchase Conventional FHA VA USDA	Business Days Refinance 3 Conventional 3 Sprint 3 FHA 3 VA		· · · ·		



Broker Portal: Dashboard, cont.

Actions Tabs break down where your attention is needed to move loans forward.



Items to Review

Run AUS: Loans that need AUS to be run.

Create Caliber LE: Wholesale loans where the Caliber LE has not yet been created.

Send Caliber LE: Wholesale loans where the Caliber LE has been created but not yet sent to the borrowers.

Borrower to eSign LE: Wholesale loans where the LE has been sent but we have not received the signature from all applicable parties. **Submit Loan**: Wholesale loans where AUS has been run and the LE sent but the loan has not yet been submitted.

CL1 loans where AUS has been run but the loan has not yet been submitted.

Lock Loan: Wholesale and CL1 loans where the loan has not yet been locked.

Order Appraisal: Wholesale loans where an appraisal is required but has not yet been ordered.

Appraisal Payment: Wholesale loans where and appraisal has been ordered but the payment has not yet been received.

Appraisal Order needs attention:

Wholesale loans where an appraisal has been ordered and payment has been received but it requires the brokers attention for any reason.

Review Active Alerts/Stops:

Wholesale loans that have any active alerts or stops that require attention.

Order CD: Wholesale or Non-Delegated Cl1 loan where the CD closing collaboration has started but the loan requires attention for successfully ordering the initial CD.

Borrower Receipt of CD confirmed:

Wholesale or Non-Delegated CL1 loans where a CD has been sent but not yet opened by all applicable parties.



Upcoming Deadlines

Lock Expiration: A loan where the lock expires in the next 7 days and is likely to expire prior to the loan funding.

Credit Doc Expiration: A loan where the current underwriting credit approval expires in the next 7 days and is likely to expire prior to the loan funding.

Upcoming Closing: Loans that have not yet funded and the estimated closing date is within the next 7 days.



Outstanding Conditions

Review and Upload Conditions: Wholesale loans with their first set of conditions.

New Conditions Added: Wholesale loans with new conditions added to them.

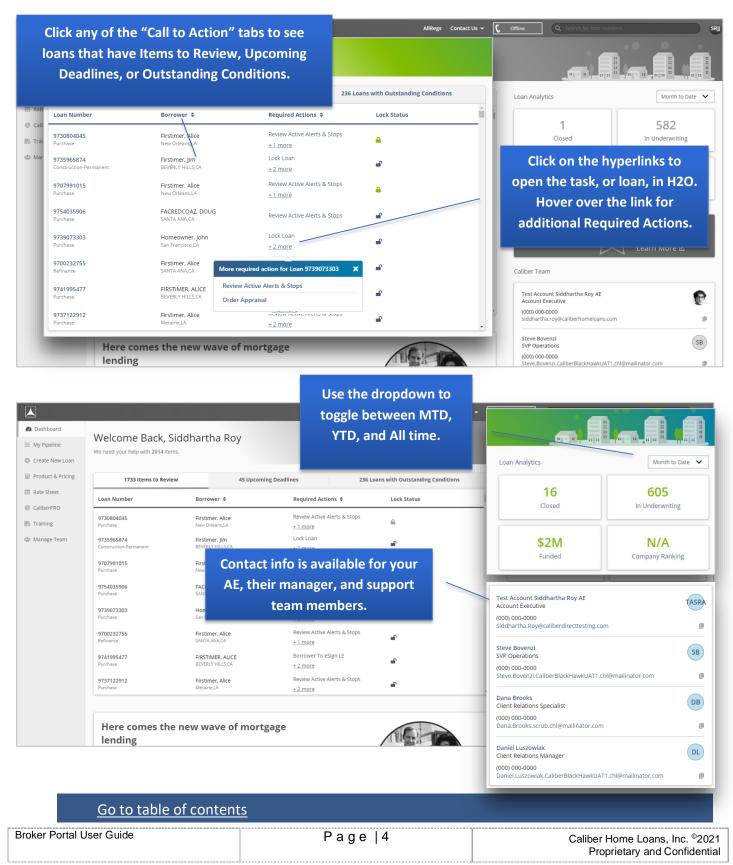
Additional Information Needed: Wholesale loans with updates made to existing conditions.

Upload Conditions for Purchase: CL1 loans that are suspended and require conditions for purchase.

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Broker Portal: Dashboard, cont.





Broker Portal: Dashboard, cont.

	*Some loan applications ar nature and complexity of th		y of asset, income, employm	ent, and other documentation required	for loan approval. Processing and	closing times vary depending o
-	Turn Times				V	iew: Business Days
	Loan Registration	Under	writing	Conditions	Initial CD	Closing Do
L	Purchase	Business Days	Refinance	Business Da	ays	
L	Conventional	3	Conventional		3	
	FHA VA	3	Sprint FHA		3 3	
	USDA	3	VA		3	
L	Jumbo	3	USDA Jumbo		3	

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Broker Portal: MyPipeline

 \checkmark

The **MyPipeline** tab is a robust, customizable, all-encompassing way to view and manage your pipeline effectively. It can be accessed by clicking on **MyPipeline** from the Navigation Menu.

Action Items	All Loans	Expiring Locks
Displays loans that need attention.	Displays all active, non-funded loans.	Default display shows any active loan with a lock that is expiring in the next 7 days.
Pending Submission	Upcoming Closings	Funded

Dashboard					AllRegs Contact Us 👻 💭 Begin Live	Chat Q Search for names, loans, etc	
Dashboard	My Pipeline						
F My Pipeline		All	Loans (895) Expiring	.ocks (47)	Pending Submissions (848)	Upcoming Closings (3)	Funded (3)
Create New Loan	Act	tic				Default Tab	Column Options T Filters
Product & Pricing	All Action It	rrower ¢	Loan Amount 🗢	Estimated Closing 🗘	Outstanding Conditions 🗘	Number of Outstanding Conditions 🗘	Upcoming Deadlines 🗘
🖽 Rate Sheet		in Homeowner ntsville, AL	\$200,000 Conforming Fixed 30	03/26/21	-	0	Lock Expiration
CaliberPRO	Loan Numb	er _{st Tester} rtland, OR	\$315,000 Conforming HomeReady Community Second Fixed 30	-	_	0	-
Training	6344515261 Refinance	t hghg	\$0	-	-	0	-
📽 Manage Team	6275162469	ות Homeowner יואק, דא	\$200,000	-	_	0	-
62888 Purcha		sadia chow TX	\$0	-	_	0	-
58547 Purchas		John Homeowner DC	\$0	-	New Conditions Added	2	-
38949 Purchas		Ken N Customer Burbank, CA	\$305,252	-	_	0	-
11986 Refinan		Harry Potter Chicago, IL	\$356,125 FHA Fixed 30	-	_	0	-
31162 Purchas		uyt hghg TX	\$0	-	_	0	-
78544	70096	uyt hghg	\$0	-	_	0	-

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Broker Portal: MyPipeline, cont.

Dashboard						AllRegs Contact Us 👻 🕻	Regin Live Chat	for names, loans, etc	
Dashboard	My Pipel	ine							
🗮 My Pipeline				Evniving	Locks (47)	Upcomi	ng Closings (3)	Funded (3)	
Create New Loan		Action Items (895)		Expiring Locks (47)					
Product & Pricing	All Actio	n Items (895) 🔻		Loan Amount 🗢	Estimated Closing 🗘		Default Tab	🛛 🗖 Column Options 🍸 Filt	.ers
Rate Sheet				\$200,000		Number of O	utstanding Conditions	• Upcoming Deadlines •	¢
CaliberPRO	Loan Nu	mber	Borrower	\$200,000 Conforming Fixed 30 \$315,000	03/26/21				
Training	63445152	261	John Home	Conforming HomeReady Community Second Fixed 30	-	0		Lock Expiration	
-	Refinance		Huntsville, A	\$0	-	-	0	-	
🖁 Manage Team	62751624 Purchase	469	Test Tester Portland, OR	\$200,000	-	_	0	_	
				\$0	_ Op	otions allow	you to set as a	default tab,	
U	tilize dro	pdown f	or	\$0	_ add	add/remove columns, filter, and export		and export to	to
ado	ditional fi	itional filter options.		\$305,252	-		excel.		
	Refinance	Chicago, IL		\$356,125 FHA Fixed 30		-	0	-	
	3116219674 Purchase	uyt hghg TX		\$0	_	-	0	-	
	7854470096	uyt hghg		\$0			0		

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Broker Portal: Create New Loan

The **Create New Loan** tab has redesigned the process to allow for an intuitive step by step flow for creating new loans.

Step

1 Click Create New Loan

- Can create a loan on behalf of another originator, who has shared their pipeline with you, using the **Originator** dropdown.
 - Can enter an unlimited number of names as **Additional Contacts.** These individuals will receive Loan Status Notifications for these loans as well.

Dashboard	AllRegs Contact Us - 🖵 Begin Live Chat Q Scarch for name
Dashboard	Create New Loan
🗮 My Pipeline	
• Create New Loan	Loan Creation Options
Product & Pricing	Originator [*] Loan Channel [*]
Rate Sheet	Jones, Joe 🗸 🔍 Wholesale 🔿 CL1
CaliberPRO	Additional Contacts to Receive Notifications
Training	First Name Last Name Phone Email
🚢 Manage Team	
	Q Add Contact

- 2 Select Import file or Manual Input
- Can import FNM 3.2 or MISMO 3.4
- To import file you can browse or Drag & Drop.

Dashboard			AllRegs Contact Us 👻 🖳	Begin Live Chat Q. Search for names.	
Dashboard	Create New Loan			Previous	
📃 My Pipeline				,	
Create New Loan	1003 Creation Method				
Product & Pricing	Create Loan y	1			
Rate Sheet	Fil Manual Input				
CallberPRO	First Name	Last Name*	SSN or ITIN*	Subject Property State [®]	AllRegs Contact Us - 💭 Begin Live Chat Q Search for names I
Training			###-#####	Select 🗸	Previous
🚢 Manage Team					
	• Crea	ate New Loan	1003 Creation Method		
	Prod	duct & Pricing	Create Loan By		
	I Rate	e Sheet	Import File Manual Inpu	ıt	
	© Calib	berPRO			
	Train	ning			
	Alle Mana	nage Team			A
				Drag &	Drop Files Here
					ses: .fnm & MISMO 3.4 file
					irowse

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Broker Portal: Create New Loan, cont.

	Step						
3 Select Loa (optional)	n Type & Loan Product	 Dropdowns wil Recent Product 					
Dashboard				AllRegs	Contact Us 👻	및 Begin Live Chat	Q Search for names
Dashboard		Create New Loan					Previous Next
🗮 My Pipeline							
Create New Loan		Assign a Product (Optional)					Primary Borrower
Product & Pricing			_				Alice Firstimer
Rate Sheet		Loan Type					
CaliberPRO		All Types	~				
Training		Loan Product Select	~				
🔹 Manage Team		Jucc					
		Lender-Paid Include Lender	der Fee in Price				
		Recent Product					
		CF30 - Conforming Fixed 30 FF15 - FHA Fixed 15					
		CA6F15 - Conforming Texas A6 Fixed 15					
		CA6F10 - Conforming Texas A6 Fixed 10					
		CHMPF30B2 - Conforming Home Possible F	ixed 30 2-1 Buydown				

4 Upload Submission Package (optional)

Dashboard	AllRegs Contact Us 🔻 🖵 Begin Live Chat 🔍 Search for names.
Dashboard	Create New Loan Previous Next
🗮 My Pipeline	
Create New Loan	Upload Submission Package (Optional) Primary Borrower
Product & Pricing	Alice Firstimer
Rate Sheet	
CaliberPRO	
Iraining	
🏰 Manage Team	Drag & Drop Files Here Supported File Types: .pdf, .jpg, .png, .tiff
	Browse

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Broker Portal: Create New Loan, cont.

Step

- 5 Select Duplicate Loan (if applicable) and/or click next.
- Duplicate loan search only applies when borrower with same name and SSN has an existing loan in your brokerage.

Dashboard						AllRegs	Contact Us 👻	D Begin L	ive Chat	Q Sear
	Create Ne	w Loan							Pre	vious
	Duplicate	oan Search								Primary
	5 Loans Fou	nd								Alice Fir
	Loan Number	Primary Borrower	Loan Stage	Originator	Creation Date	Address	Unit	City	State	Zip
	10034017	95 Alice, Firstimer	Cancelled	Jones, Joe	01/11/2021	6559 Louisville St		New Orleans	LA	7012
	10082768	Alice, Firstimer	Cancelled	Jones, Joe	02/09/2021	6559 Louisville St		New Orleans	LA	7012
	10358012	Alice, 17 Firstimer	Approved w / Conditions	Jones, Joe	04/08/2021	6559 Louisville St		New Orleans	LA	7012
	10389989	Alice, 18 Firstimer	Created	Jones, Joe	04/18/2021	9991 Warford		Dawson	IA	5006
	10493526	79 Alice, Firstimer	Cancelled	Jones, Joe	01/14/2021	6559 Louisville St		New Orleans	LA	70124

6 Complete Application Tracker (if applicable)

- Select applicable Property Address radio button indicating if your borrower has identified a property address or if the loan is a TBD.
- Enter Application Date and Confirm all 6 Key Points of Data have been received.

Dashboard		AllRegs Contact Us - 💭 Begin Live Chat
Dashboard	Create New Loan	Previous Confirm
📰 My Pipeline		
O Create New Loan	Application Tracker	Primary Borrower
Product & Pricing		Alice Firstimer
Rate Sheet	6 of 6 Key Points of Data	
@ CaliberPRO	Borrower Name	✓ Alice Firstimer
	SSN / ITIN / PassportID	✓ XXX-XX-9991
Training	Gross Monthly Income	✓ \$20,131.15
😂 Manage Team	Appraised Value	✓ \$400,000
	Loan Amount	✓ \$320,000
	Subject Property Address	 3516 Beverly Dr, Dallas, TX 75205-2802, Dallas
	Please confirm one of the following: This is a TBD and the borrower has not identified a property address for The borrower has identified a property address for this transaction 	r this transaction
	You have entered all 6 Key Points of Data in the loan record. Your Loan Estimate will need to be delivered within 3 business	days of 04/29/2021.
	Application Date	
	04/29/2021	n I have received all 6 Key Points of Data
Go to table of conten	<u>ts</u>	-
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Broker Portal: Create New Loan, cont.

Step

7 New Loan Has Been Created

- Move forward with loan from What would you like to do next? section.
- Each link will navigate you to that specific area for your loan.

Dashboard	AllRegs Contact Us 🔻 🖵 Begin Live Chat	Q Search for names.
Dashboard	Create New Loan	Open Loan
🔲 My Pipeline		
• Create New Loan	Loan 6978941572 - Firstimer has been successfully created.	
Product & Pricing		
🖽 Rate Sheet		
CaliberPRO		
Training		
4 Manage Team		
	What would you like to do nex ?	
	Go to 1003 →	
	Price & Lock → Order VOE/VOI →	
	Order VOA >	
	ClearChoice AUS →	
	Create Loan Estimate →	

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Broker Portal: Product & Pricing

The **Product & Pricing** tab provides a streamlined and more robust pricing and eligibility tool with dynamic fields based on inputs. It will allow you to easily **Lock, Assign, and Compare** products & rates and can be accessed by clicking on **Product & Pricing** from the Navigation Menu.

Within this section, find steps on how to:

- Lock Your Loan
- Assign a Rate/Product
- Compare Products

Dashboard				AllRegs Contact Us 👻 🖵 Begin Live Chat	search for names, loans, etc
Dashboard	Product				± Upload 3.2/3.4 Sea
📰 My Pipeline					<u>Clear All</u>
Create New Loan	Search Cr				
	Apply Sear	~	Manage Scenarios		
Product & Pricing	Scenario				
Π Rate Sheet	Select	Rate Sheet			
CaliberPRO	~	Select 🗸			
Training	Overall				
😩 Manage Team		Lien Position Document Type*	Existing Calib	Der Borrower	
	Loan Type 🗸 🗸	2nd Full	Existing Calib	er borrower	
Produ	ict Features				
		Amortization Term *	Amortization Type *	Interest Only Years	
Loan T		30 Year 25 Year	Fixed ARM	No Interest Only	
	nventional IA	20 Year 15 Year		Temporary Buydown No Buydown	
		10 Year		Escrow	
	DA			Impound Taxes And Insura 💙	
Loan Info	rmation				
Appraised \$0	Value [*]	Sales Contract Price*	Down Payment %	Down Payment Amount	
Base Loan	Amount*	Subordinate Financing			
\$0		Yes No Use	rs can now sear	ch for more	
LTV 0.000		tha	n one Loan Type	e in a single	
			search.		
Property Zip Code*		State"	Property Type"	PUD'	
		Select 🗸	Select V	O Yes	
County*	~	City	Property Will Be*	○ N0	
Select # of Units"	•		Select 🗸		
1	~				
Borrower	Details				
Borrower T			Consider Matilanal	Self-Employed Borrowers*	
US Citize	en 🗸	 Veteran Non-Traditional Credit 	Foreign National Asset Dissipation	Ves No	
		Lowest Middle FICO*	# of Financed Properties		
DTI%*		Lowest minute Fills	1		



Broker Portal: Product & Pricing (Lock Loan)

Step

Fill in all required fields as indicated with the red asterisk *

- There are 3 ways a user can search for producs and pricing.
 - By using a defaulted or previously created scenario
 - By importing a FNM 3.2/MISMO 3.4 file
 - By manually inutting the search criteria
- The 3 most commonly used scenarios are available in the **Scenario** drop down.

Dashboard						AllRegs	Contact Us 👻	Begin Live Chat	Q Sea	rch for names, loans, ei	IC		
Dashboard	Product & Pricing										1. Upload 3.2/3.4	Search	
I My Pipeline													
Create New Loan	Search Criteria											Clear All Fields	
Product & Pricing	Apply Search Scenario												
Rate Sheet	Scenario			_									
© Caliberriso	Select		~		Manage Scenarios								
Training	L												
	Overall		-										
🚢 Manage Team	Loan Type*	Rate Sheet											
	Select 🗸	Select	~										
	Loan Features												
	Loan Purpose	Lien Position	Document Type*										
	Purchase 🗸	 1st 2nd 	Full		Existing Calib	er Borrower							

2 Locate your rate

- Rates for 30, 45, 60, & 90 days are displayed with each search and you can toggle between each one.
- Locate additional rates for your product by clicking the ^ next to the desired product.
- Click on links under Credit/Cost or Monthly MI (if applicable), for a pricing breakdown.

Dashboard					AllRegs Contact Us 👻	및 Beg	in Live Chat	Q Sei	arch for names, loans, etc	
Dashboard My Pipeline	Product & Pricing									
Create New Loan	[_		Click the per	
Product & Pricing	Appraised Value \$400,000.00	Sales Contract Price \$400,000.00	Down Payment %		Credit/Cost Breakdown		×		your search	n criteria.
Rate Sheet	Base Loan Amount	Zip Code	DTI%		Adjustment	Rate	Price			
CaliberPRO	\$320,000.00	75205-2802	35.000	1	Base Rate/Price	2.625%	(2.456)			
Training					Lender Paid Compensation		1.500			J.
Manage Team					State		(0.150)			
	Eligible Products				FICO Bonus		(0.250)		Co	mpare Products (0/5)
	30 Day Lock 06/02/2021	45 Day Lock 06/17/2021		60 Day Lock 07/02/2021	Purchase Special		(0.400) 1.250		Priced 05/03/2021	04:47 PM CST
	Product			Final Rate	Final Rate/Price	2.625%	(0.506)	P&I \$	Monthly MI 🗢	
	 CF30 Conforming Fixed 30 			2.625%	(0,506%)/\$1.619	1.20	\$1,285.2	8	\$0.00	
				2.25%	1.553%/(\$4.969.	.60)	\$1,223.1	9	\$0.00	
	Go to table of	<u>contents</u>								
er Portal Use	er Guide		Pag	e 13					Caliber Home Proprietar	Loans, Inc. ⁽ y and Confic



Broker Portal: Product & Pricing (Lock Loan), cont.

Step

3 Select Lock from Actions menu by desired rate

- Dropdown appears by hovering mouse over desired rate.
- Ineligible products and Near Misses with the reason(s) for being ineligible will appear at the bottom of the screen.

Dashboard				AllRe	gs Contact Us 👻 💭 Beg	jin Live Chat Q Se	earch for names, loans, etc	
Dashboard	Product & Pricing							
 My Pipeline Create New Loan 	\$400,000.00	\$400,000.00	20	\$80,000	00			
Product & Pricing	Base Loan Amount	Zip Code	DTI%	Escrow				
Rate Sheet	\$320,000.00	75205-2802	30.000	Impound	Taxes And Insurance			
CaliberPRO								ø
Training	Eligible Products							Compare Broducts (0/5)
🏥 Manage Team								Compare Products (0/5) 👻
	30 Day Lock 06/01/2021	45 Day Lock 06/14/2021		60 Day Lock 06/28/2021	90 Day Loc 07/28/2021		Priced 04/29/202	1 15:25 PM CST
	Product			Final Rate	Credit/Cost	Monthly P&I 🗘	Monthly MI 🕈	
	CF30 Conforming Fixed 30			2.625%	(0.506%)/\$1.619.20	\$1.285.28	\$0.00	Actions 🗸
	CHMPF30 Conforming Home Possible Fig.	xed 30		2.625%	(0.505%)/\$1.619.20	\$1,285.28	\$0.00	Lock Assign Compare
	CHRCSF30 Conforming HomeReady Com	munity Second Fixed 30		2.625%	(0.505%)/\$1.619.20	\$1,285.28	\$0.00	
	 CHRF30 Conforming HomeReady Fixed 3 	10		2.625%	(0.506%)/.\$1.619.20	\$1,285.28	\$0.00	
	Ineligible Products							-
	Product			Reason				
	CDRF30 Conforming Doctor/Physician Fixed	130		Minimun	credit score is less than 720.			
	CHMPHBF30 Conventional Conforming Hon	ne Possible High Balance Fixed 30		The loan	amount \$320.000.00 exceeds g	uidelines.		

4 Verify Lock Detail

• Complete required fields and click Lock.

ce Derty xisting Caliber Borrower Street Address*	Last Name" Firstimer	554° X000000 9991		8	ack Lock
Aary Borrower Neme* ce berty sting Callber Borrower Street Address* D					
Name ce serty xisting Caliber Borrower Street Address PD					
Name ce serty xisting Caliber Borrower Street Address PD					
ce Derty xisting Callber Borrower Street Address*					
visting Caliber Borrower Street Address [®]	Firstimer	2004-302-9991			
sisting Caliber Borrower Street Address*					
sisting Caliber Borrower Street Address*					
Street Address*					
PD (
3516 Beverly Dr	7in Code*	Citw [*]			
		No. of Units*			
xas 🗸	DALLAS	1			
ew Loan Details					
uct Code			Lien Position	Loan Type	
		30			
j	30 Year		N/A	N/A	
elec xas	t- V Loan Details	t- 75205-2802 County" DALLAS Code Product Description Conforming Fixed	t- 75205-2002 DALLAS County' No. of Units' DALLAS 1 Loan Details Code Product Description Conforming Fixed 30 ntion Type Amortization Term	t- 75205-2802 DALLAS County' No. of Units' County' No. of Units' DALLAS I County County Product Description Conforming Fixed 30 First tation Type Amortization Term Interest Only Years	t. v 75205-2002 DALLAS County No. of Units* County DALLAS County 1 County Conforming Fixed 30 trion Type Anontization Term Interest Only Years Temporary Buy down



Broker Portal: Product & Pricing (Lock Loan), cont.

Step	
5 Complete Address Verification	 Select applicable radio button and then Confirm.
Address Verification	×
USPS Verified Address	
O 3516 Beverly Dr, Dal	las, TX 75205-2802
Unverified Address	
○ 3516 Beverly Dr, DA	LLAS, TX 75205-2802
	Cancel

6 Select Rate and then click Lock My Loan.

- Click Lock My Loan if desired rate and term shows selected.
- Click See More Rates for additional rate options to select from.

Dashboard				AllRegs Contact	Us 👻 🖵 Begin Live Chat	or names, loans, etc
 Dashboard My Pipeline 	Lock Loan					Lock My Loan
Create New Loan	Lock Information					
Product & Pricing Rate Sheet CaliberPRO	Primary Borrower Alice Firstimer	Borrower Address 3516 Beverly Dr DALLAS, TX 75205-2802 Dallas County	Product Type Conforming Fixed 30 - CF30			
Training	Lock Selection					
🚢 Manage Team	Lock	Final Rate	Credit/Cost	Montly P&I	Monthly MI	
	30 Day	2.625%	(0.506%)/\$1.619.20	\$1.285.28	<u>\$0.00</u>	✓ Selected
	45 Day	2.625%	(0.271%)/\$867.20	\$1,285.28	50.00	Select Lock
	60 Day	2.625%	(0.236%)/\$755.20	\$1,285.28	\$0.00	Select Lock
	Click "See Mor	e Rates" to view	0.024%./ (\$76.80)	\$1,285.28	\$0.00	Select Lock
	additional	rate options.		See More Rates		
_	Price Breakdown					
	Adjustment Description			Price(%)		
	Base Price			(2.456)		
	Total Price Adjustment			1.95		

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Broker Portal: Product & Pricing (Lock Loan), cont.

Step

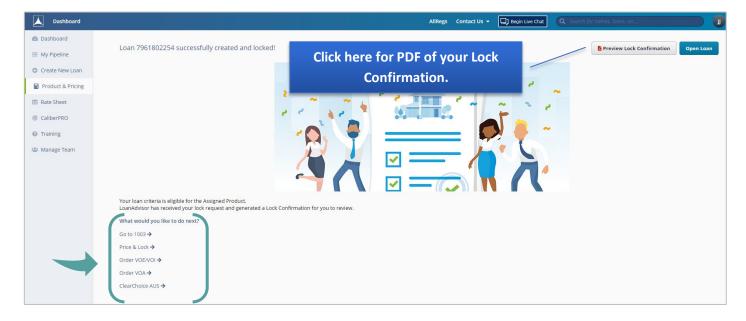
7 Complete Application Tracker (if applicable)

- Enter Application Date.
- Confirm all **6 Key Points of Data** have been received.
- Click Lock My Loan.

Dashboard		AllRegs Contact Us 👻 🖵 Begin Live Chat	🔍 Search for names, loans, etc
Dashboard	Lock Loan		Lock My Loan
🗮 My Pipeline			
Create New Loan	6 of 6 Key Points of Data		
Product & Pricing	Borrower Name	✓ Alice Firstimer	
Rate Sheet	SSN / ITIN / PassportID	✓ XXX-XX-9991 ③	
	Gross Monthly Income	✓ \$20,131.15	
CaliberPRO	Appraised Value	✓ \$400,000	
Training	Loan Amount	✓ \$320,000	
🚢 Manage Team	Subject Property Address	 3516 Beverly Dr, DALLAS, TX 75205-2802, Dallas 	
	04/30/2021	J	

8 New Loan Has Been Created and Locked

- Move forward with loan from What would you like to do next? section.
- Each link will navigate you to that specific area for your loan.



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Broker Portal: Product & Pricing (Assign a Rate/Product)

Step

Fill in all required fields as indicated with the red asterisk *

- There are 3 ways a user can search for producs and pricing.
 - By using a defaulted or previously created scenario
 - By importing a FNM 3.2/MISMO 3.4 file
 - By manually inutting the search criteria
- The 3 most commonly used scenarios are available in the Scenario drop down.

Dashboard						AllRegs	Contact Us 👻	Begin Live Chat	Q Sear	ch for names, loans, (etc	
 Dashboard My Pipeline 	Product & Pricing										2 Upload 3.2/3.4	Search
O Create New Loan	Search Criteria											Clear All Fields
Product & Pricing	Apply Search Scenario											
Caliberrico	Scenario Select		~	B Manag	e Scenarios							
Training	Overall											
🖶 Manage Team	Loan Type*	Rate Sheet										
	Select 🗸	Select	~									
	Loan Features											
	Loan Purpose*	Lien Position 1st	Document Type*	~	Existing Caliber 8	orrower						
	Purchase	2nd	FUI	~								

2 Locate your rate

- Rates for 30, 45, 60, & 90 days are displayed with each search and you can toggle between each one.
- Locate additional rates for your product by clicking the ^ next to the desired product.
- Click on links under Credit/Cost or Monthly MI (if applicable), for a pricing breakdown.

Dashboard					AllRegs Contact Us 👻	밎ᄜ	jin Live Chat	9	, Search for names, loans, etc
Dashboard	Product & Pricing								
My Pipeline									Click the pencil to edit
Create New Loan	Appraised Value	Sales Contract Price	Down Payment %	C	Credit/Cost Breakdown		×		your search criteria.
Product & Pricing	\$400,000.00	\$400,000.00	20	\$	Adjustment	Rate	Price		your search chierten
Rate Sheet	Base Loan Amount	Zip Code	DTI%	E					
CaliberPRO	\$320,000.00	75205-2802	35.000	h	Base Rate/Price	2.625%	(2.456)		
Training					Lender Paid Compensation		1.500		1
🚢 Manage Team					State		(0.150)		
	Eligible Products				FICO Bonus		(0.250)		Compare Products (0/5)
	30 Day Lock 06/02/2021	45 Day Lock 06/17/2021		60 Day Lock 07/02/2021	Purchase Special		(0.400)		Priced 05/03/2021 04:47 PM CST
	Product			Final Rate	Final Rate/Price	2.625%	(0.506)	P&I ¢	Monthly MI 🗢
	 CF30 Conforming Fixed 30 			2.625%	(0,506%)/.\$1.6	19.20	\$1,285.2	В	\$0.00
				2.25%	1,553%/(\$4.96	9.60)	\$1,223.1	Ð	\$0.00
	Go to table of o	<u>contents</u>							
er Portal Use	er Guide		Pag	e 17					Caliber Home Loans, Inc. [©] Proprietary and Confid



Broker Portal: Product & Pricing (Assign a Rate/Product), cont.

Step

3 Select Assign from Actions menu by desired rate

- Dropdown appears by hovering mouse over desired rate.
- Ineligible products and Near Misses with the reason(s) for being ineligible will appear at the bottom of the screen.

Dashboard				AilReg	s Contact Us 👻 🖵 Be	gin Live Chat Q Sea	rch for names, loans, etc	
 Dashboard My Pipeline 	Product & Pricing							
Create New Loan	\$400,000.00	\$400,000.00	20	\$80,000.0	0			
Product & Pricing	Base Loan Amount	Zip Code	DTI%	Escrow				
Rate Sheet	\$320.000.00	75205-2802	30.000	Impound	Taxes And Insurance			
CaliberPRO								1
Training	Eligible Products						Co	empare Products (0/5)
🖶 Manage Team	30 Day Lock 06/01/2021	45 Day Lock 06/14/2021		60 Day Lock 06/28/2021	90 Day Loo 07/28/202		Priced 04/29/2021 1	15:25 PM CST
(Product			Final Rate	Credit/Cost	Monthly P&I 💠	Monthly MI 🕈	
	> CF30 Conforming Fixed 30			2.625%	(0.506%)/\$1.619.20	\$1.285.28	\$0.00	Actions 🕶
	CHMPF30 Conforming Home Possible	Fixed 30		2.625%	(0.506%) / \$1.619.20	\$1,285.28	\$0.00	Lock Assign Compare
	CHRCSF30 Conforming HomeReady Co	ommunity Second Fixed 30		2.625%	(0.506%) / \$1.619.20	\$1,285.28	\$0.00	
	CHRF30 Conforming HomeReady Fixed	1 30		2.625%	(0.506%) / \$1.619.20	\$1.285.28	\$0.00	
	Ineligible Products							
	Product			Reason				
	CDRF30 Conforming Doctor/Physician Fix	ed 30		Minimum	credit score is less than 720.			
	CHMPHBF30 Conventional Conforming H	ome Possible High Balance Fixed 30		The loan a	mount \$320,000.00 exceeds a	guidelines.		

4 Verify Loan Details

• Complete required fields and click Assign.

Dashboard						AllRegs Contact Us 👻	Begin Live Chat	Q Search for names, loans, etc	
Dashboard	Assign Loan								Back Assign
🔲 My Pipeline	Verify Loan Details								
Create New Loan									
Product & Pricing	Primary Borrower								
Rate Sheet	First Name*		Last Name*		SSN*				
	Alice		Firstimer		XXX-XX-9991	۲			
CaliberPRO									
Training	Property								
😩 Manage Team	Existing Caliber B	orrower							
		Street Address*							
	TBD	3516 Beverly Dr							
	Unit Type		Zip Code*		City*				
	-Select-	~	75205-2802		DALLAS				
	State		County		No. of Units*				
	Texas	~	DALLAS	~	1				
	Review Loan Detai	ls							
	Product Code			Product Description		Lien Position		Loan Type	
	CF30			Conforming Fixed	30	First		Conventional	
	Amortization Type			Amortization Term		Interest Only Years		Temporary Buydown	
	Fixed			30 Year		N/A		N/A	

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Broker Portal: Product & Pricing (Assign a Rate/Product), cont.

Step	
Complete Address Verification	 Select applicable radio button and then Confirm.
Address Verification	×
USPS Verified Address	
O 3516 Beverly Dr, Da	llas, TX 75205-2802
Unverified Address	
🔵 3516 Beverly Dr, DA	LLAS, TX 75205-2802
	Cancel

6 Complete Application Tracker (if applicable)

- Select applicable **Property Address** radio button.
- Enter Application Date and Confirm all 6 Key Points of Data have been received.

Dashboard		AllRegs Contact Us - 🖵 Begin Live Chat Q Sear	ch for names, loar
 Dashboard My Pipeline Create New Loan 	Assign Loan Verify Loan Details Application Tracker		Assign
Product & Pricing	6 of 6 Key Points of Data		
Rate Sheet	Borrower Name	me 🖌 Alice Firstimer	
CaliberPRO	SSN / ITIN / Passporti	rtiD 🗸 XXX-XX-9991 💿	
Training	Gross Monthly Income	me ✓ \$20,131.15	
🚢 Manage Team	Appraised Value	alue 💙 \$400,000	
	Loan Amoun	unt 💙 \$320,000	
	Subject Property Addres	ress 3516 Beverly Dr, Dallas, TX 75205-2802	
	You have entered all 6 Key Points of Data in the loan record Your Loan Estimate will need to be delivered within 3 busin Application Date 04/29/2021	ord. siness days of 04/29/2021. I confirm I have received all 6 Key Points of Date	

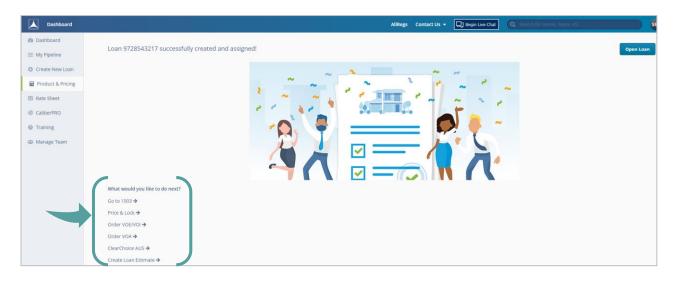
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Broker Portal: Product & Pricing (Assign a Rate/Product), cont.

Step

New Loan Has Been Created and Assigned
 Move forward with loan from What would you like to do next? section.
 Each link will navigate you to that specific area for your loan.



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Broker Portal: Product & Pricing (Compare Products)

Step

Fill in all required fields as indicated with the red asterisk *

- There are 3 ways a user can search for producs and pricing.
 - By using a defaulted or previously created scenario
 - By importing a FNM 3.2/MISMO 3.4 file
 - By manually inutting the search criteria
- The 3 most commonly used scenarios are available in the Scenario drop down.

Dashboard	AllBegs Contact Us + 🛄 Brojn Live Char. Q. Storch för names. Koms	etc
Dashboard	Product & Pricing	L Upload 3.2/3.4 Search
My Pipeline Create New Loan	Search Criteria	Clear All Fields
Product & Pricing	Apply Search Scenario	
II Rate Sheet	Select Vanage Scenarios	
Caliberriko		
🕮 Manage Team	Overall Losn Type* Rate Sheet	
	Select V Select V	
	Loan Features	
	Loan Purpose Lien Position Document Type	
	Purchase 2 2nd Full 2 Existing Caliber Borrower	

2 Locate your rate

- Rates for 30, 45, 60, & 90 days are displayed with each search and you can toggle between each one.
- Locate additional rates for your product by clicking the ^ next to the desired product.
- Click on links under Credit/Cost or Monthly MI (if applicable), for a pricing breakdown.

Dashboard					AllRegs Contact Us 👻 🕻] Begin Live Cha	t Q	, Search for names, loans, etc
Dashboard	Product & Pricing							
My Pipeline							-	Click the pencil to edit
Create New Loan	Appraised Value	Sales Contract Price	Down Payment %		Credit/Cost Breakdown	×		
Product & Pricing	\$400,000.00	\$400,000.00	20		\$			your search criteria.
Rate Sheet	Base Loan Amount	Zip Code	DTI%		Adjustment Ri	nte Price		
CaliberPRO	\$320,000.00	75205-2802	35.000		Ir Base Rate/Price 2.4	i25% (2.456)		
Training					Lender Paid Compensation	1.500		
Manage Team					State	(0.150)		
	Eligible Products				FICO Bonus	(0.250)		Compare Products (0/5)
	•				Purchase Special	(0.400)		
	30 Day Lock 06/02/2021	45 Day Lock 06/17/2021		60 Day Lock 07/02/2021	FICO	1.250		Priced 05/03/2021 04:47 PM CST
	Product			Final Rate	Final Rate/Price 2.	525% (0.506)	P&I \$	Monthly MI 🗢
	 CF30 Conforming Fixed 30 			2.625%	(0,506%)/\$1.619.20	\$1,285.	28	\$0.00
				2.25%	1.553%/(\$4.969.60	\$1,223.	19	\$0.00

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Broker Portal: Product & Pricing (Compare Products), cont.

Step

- 3 Select Compare from Actions dropdown and click Compare Products
 - Dropdown appears by hovering mouse over desired rate.
 - Can compare up to 5 different rates/products within any of the lock terms returned.

Dashboard					AllRegs	Contact Us 👻	🖵 Begin Live Chat	Q Search for names, loan	s, etc
Dashboard	Product & Pricing								
🗮 My Pipeline									
Create New Loan									
Product & Pricing	Appraised Value	Sales Contract Price	Down Payment %		Down Payme	nt Amount			
Rate Sheet	\$400,000.00	\$400.000.00	20		\$80,000.00				
CaliberPRO	Base Loan Amount \$320,000.00	Zip Code 75205-2802	DTI% 35.000		Escrow	ixes And Insurance			
Iraining									
🚢 Manage Team									ompare Products (2/5) 🔹
	Eligible Products							Priced 04/30/2021	12:08 PM CST
	30 Day Lock 06/01/2021	45 Day Lock 06/14/2021		60 Day Lock 06/29/2021			Day Lock /29/2021	Monthly MI 🗢	
	Product			Final Rate		Credit/Cost	N		7
	CF30 Conforming Fixed 30			2.625%		(0.506%)/\$1.61	9.20 \$	<u>\$0.00</u>	Comparing 👻 📮 1
	CHMPF30 Conforming Home Possible F	ixed 30		2.625%		(0.506%)/\$1.61	<u>9.20</u> \$	\$0.00	Comparing 👻 📕 1
	CHRCSF30 Conforming HomeReady Cor	mmunity Second Fixed 30		2.625%		(0.506%) / \$1.61	9.20 \$	\$0.00	Actions 🗸
	CHRF30 Conforming HomeReady Fixed	30		2.625%		(0.506%) / \$1.61	9.20 \$		Lock
	Ineligible Products							\$0.00	Assign Compare
	Product				Reason				

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Broker Portal: Product & Pricing (Compare Products), cont.

Step

4 Select Assign or Lock Loan

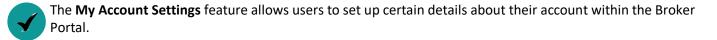
- Click <u>here</u> if you select Assign to complete the Assign a Rate/Product process.
- Click <u>here</u> if you select Lock Loan to complete the Lock Loan process.

Dashboard				
Dashboard	Products Comparison	I	Go ba	ck To Search Results
🗮 My Pipeline				
Create New Loan	Conforming Fixed 3	0 ×	Conforming Home	Possible ×
Product & Pricing	5		Fixed 30	
🗉 Rate Sheet				
CaliberPRO				
Training	2.625% Interest Rate		2.625% Interest Rate	
🚢 Manage Team	Cost/Credit Percent	(0.506%)	Cost/Credit Percent	(0.506%)
	Cost/Credit Amount	\$1,619.20	Cost/Credit Amount	\$1,619.20
	Monthly P & I	\$1,285.28	Monthly P & I	\$1,285.28
	Monthly MI	\$0.00	Monthly MI	\$0.00
	Terms	30 Years	Terms	30 Years
	Lock	30 Days	Lock	30 Days
	Assign		Assig	n
	Lock Loa	an	Lock Lo	ban

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Broker Portal: My Account Settings



		Step			
Click	on your name icor	and then My	Account Setting	S	
		Q Sea	rch for names, loans, etc	TADSB	
			🕒 Test A	ccount Deepak Sundaram Broker	
			My Accou	nt Settings	
			Change P		
		alytics	Sign Out	Month to Date 🗸	
My Em	nployee Details	Pipelir	ne Access	Credit Vendor Credentials	Notifications
	ter NMLS license		grant other	Add/edit credit provider accounts to use when pulling credit.	Set preferences for loan status notifications (LSN's that are received on each
	r and additional ontact info.		the brokerage heir pipeline.		
			nen pipenne.	punng creuit.	loan.
_					
	My Account				Save Changes
	My Employee Details		Pipeline Access	Credit Vendor Credentials	Notifications
	Account				
	Account Username Deepak.sundaram.broker	Employee Role Loan Officer			
	Name				
	First Name Test Account	Middle Name	Last Name Deepak Sundaram Broker	Suffix	
	reservedune		occpar sundaram broker		

111111			
Contact			
Office Phone Number*	Office Extension	Cell Phone Number	
(000) 000-0000			
Email Address*			
deepak.sundaram@caliberho	meloans.com		

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Broker Portal: My Account Settings, cont.

My Employee Details: Enter NMLS License number and additional contact info	0.
--	----

ly Account					Save Change
My Employee	Details	Pipeline Access	Credit Vendor Credentials	Notifications	
Account Account Username Deepak.sundaram.broker	Employee Role Loan Officer		NMLS license number and con can be edited from the		
Name First Name Test Account	Middle Name	Last Name Deepak Sundaram Broker	Suffix		
License Originator NMLS License #* 111111					
Contact Office Phone Number*	Office Extension	Cell Phone Number			
Email Address* deepak.sundaram@caliberho	meloans.com				

Pipeline Access: Users can grant other users within the brokerage access to their pipeline.

My Employee Details	Pipeline Access	Credit Vendor Credentials	Notifications
veline Access Settings , Search by name wr All 195 active employees	Use search box to quickly se specific user.	earch for	
mployee Name 🗢		an Access Test Account's Pipeline 🕽 🗢	
A-SOne AA-S-One			
A-S-THREE AA-S-THREE			
AA-Two AAA-TWO			Clicking the check box
AAA AAAB			will grant that user access to your pipeline
AAC AAAD	2		
AAEELEVEN AAAELEVEN			
AA-TEN AAATEN			

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Broker Portal: My Account Settings, cont.

Credit Vendor Credentials: Add/edit credit provider accounts to use when pulling credit.

My Account			Save Changes
My Employee Details	Pipeline Access	Credit Vendor Credentials	Notifications
Accounts			
Credit Agency	Account Username	Account Passwor	d
	▼	password	
+ Add Another Account			

Notifications: Set preferences for loan status notifications (LSN's) that are received on each loan.

y Account						Save Changes
My Employee Details		Pipeline Access	Credit Vendor Crede	entials	Notifications	
View Change History		- "View Char	ge History" shows a list	of		
General Notifications						
Receive Caliber Rate Sheets		what ch	anges have been made.			
Loan Notifications						
Pre-Submission						
Unselect All						
The FHA Case Number Request has been seen as the second	en submitted for loan					
Thank you for your loan Registration						
Thank you for your loan Submission						
Application Accepted for Loan						
LE Package has been e-signed by borro	wer					
Underwriting						
Unselect All	Checking no	otification boxes v	vill enable			
UW Decision Updated Handler						
 Underwriting Approved Handler 	LSN notifica	tions for that spe	cific event.			
Loan is in Underwriting						
Appraisal						
Unselect All						
Appraisal update has been posted for L	oan					
Reply to Appraisal Cancellation Request	t has been received for Loan					
Vour appraisal is complete for Loan						
The appraisal for loan has received a contract of the appraisal for loan has received a contract of the appraisal for loan has received a contract of the appraisal for loan has received a contract of the appraisal for loan has received a contract of the appraisal for loan has received a contract of the appraisal for loan has received a contract of the appraisal for loan has received a contract of the appraisal for loan has received a contract of the appraisal for loan has received a contract of the appraisal for loan has received a contract of the appraisal for loan has received a contract of the appraisal for loan has received a contract of the appraisal for loan has received a contract of the appraisal for loan has received a contract of the appraisal for loan has received a contract of the appraisal for loan has received a contract of the appraisal for loan has received a contract of the approximation of the appro	mmunication					

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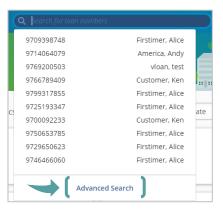
Broker Portal: Advanced Search

The **Advanced Search** feature allows users to search for existing loans within the Broker Portal using additional search criteria.

Step

1 Select Advanced Search

 Click in the search bar from any screen within the Broker Portal and then Advanced Search.



2 Enter Search Criteria

Click **Search** when all desired criteria has been entered.

			Contact Us 👻	D Begin Live Chat	Q Search for loan numbers	SRJ
Dashboard	Advanced Search					Search
🗏 My Pipeline						
Create New Loan	Search Criteria					Expand All / Collapse All
Product & Pricing	✓ Overall					
Rate Sheet	Include loans created after		Loan Officer			
CaliberPRO	mm/dd/yyyy	Exclude Cancelled Loans	Joe Jones, Siddhartha Roy	~]	
m Training	Loan Stage (From)	Loan Stage (To)				
🚢 Manage Team	~	~				
	✓ Loan Features					
	Purpose	Document Type	Loan Type			
	~	~		~]	
	Amortization Term					
	~					

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Broker Portal: Advanced Search, cont.

St	tep						
3 Select loan i search resul	number from ts	 Click on <i>J</i> 	to modify the s	Search Cri	teria.		
Advanced Search						Reset	Search
Search Criteria Borrower First Name	Borrower Last Name Firstimer	Property City 	Loan Stage (Fro 	m)	Loan Stage (To) 	Property Type 	ø
14 search results							
Loan Number	Borrower 🗢	SSN ¢	Property Address 🗢	Lock Status	Product 🗢	Loan Stage 🗢	
4969050223 Purchase	Alice Firstimer	XXX-XX-2222	3726 Poplar St. Dawson IA 50066	2.75% Expires 07/22/2021	FF30	Created 41	
8811242538 Purchase	Alice Firstimer	XXX-XX-9991	3726 Poplar St. Dawson IA 50066-1111	3.25% Not Locked		Created 42	
8310156129 Purchase	Alice Firstimer	XXX-XX-9999	3726 Poplar St. Dawson IA 92602	2.75% Not Locked	FF30	Created 43	
1506986636 Purchase	Alice Firstimer	XXX-XX-9999	3726 Poplar St. IRVINE CA 92602	2.75% Not Locked	FF30	Created 43	

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Broker Portal: H2O



Accessing **H2O** from the Broker Portal brings improved functionality and increased efficiency for working on your loans.

Left Menu: Allows for easy navigation within H2O to access the necessary steps and pages required throughout the lifecycle of the loan.

Right Menu: Provides Loan Summary and Key Dates for the loan to be located with one click.

- Click on local to expand the Loan Summary for more information about the Property, Loan, Underwriting details, or Borrower.
- Click on **E** to have the contact detail for the loan open in a new window.
- Click on **o** to expand the **Date Tracker** which provides key dates for the loan.

Menu	"Menu" allows to toggle betwee Global Menu and Loan Menu opt	tions	, Search for loan numbers
1003 V		Contact Us Log Out Begin Live Chat My Pipeline My Pipeline Dashbaard Resources	Loan Summary
Property & Borrower Emp, Income & Housing Assets, Liab & REO	Summary Contacts Wholesale Status Validations Lender Paid 1.759%, 9792481872 - Firstimer, Alice UW Submitted .view/Edit Lock 2 2 2	Soreens 1003 DIS CFILE TOOIS CAVE VLADO Redesigned 1003 UW Submitted R 2 Depres Claim Biphily Switch to Traditional URLA	Address 6559 Louisville St Property Type Detached Number of Units
Decl. & Demo. information Details of Transtraction Addendum	9/27/0221 08/27/021 - Carcellotor/Danial Calificett: Fees & Disclosures Order Out: Digital Hortgage Als: AUS Aggrented: Order/View Status Aggrented: Order/View Status	Demographic Information	1 Property Rights Fee Simple Purchase Price \$300,000.00
Product & Pricing View / Edit Lock	Wy crite Docs / Conditions COC Request a Change 1003 Print Document CD Collaboration [Borrower Details]	Save & Next Copy from Borrower Manage Borrowers	Appraised Value \$300,000.00 Property Will Be Primary Residence
Disclosure >	V Date Tracker First Name: Jace Home # \$5555555 History Tracker Mddl Name: is Work # Alert/Stops History Last Name: is Work #	First Name: Hone # Extension Middle Name: Work # Extension List Name: Cell # Cell # Cell #	> Loan
Clear Choice AUS Appraisal	Soffic: ss DOI: 30/2/3986 SSN XXXXXX4993 Age: 34 Vituative at 1111 Vituative at 1111 Age: 34	TransUnion/Empirica: Non-Traditional Credit	Underwriting Borrower
Docs & Conditions CD Collaboration	EquifivititaCont: Foreign National F Clectronic Dellivery and Borrower Auth BORROWER HURST ROXIDE CONSENT FOR F-DELIV borrower before enterting Docugina Access code below:Come Borrower Consent Received	tigenery beaution:	

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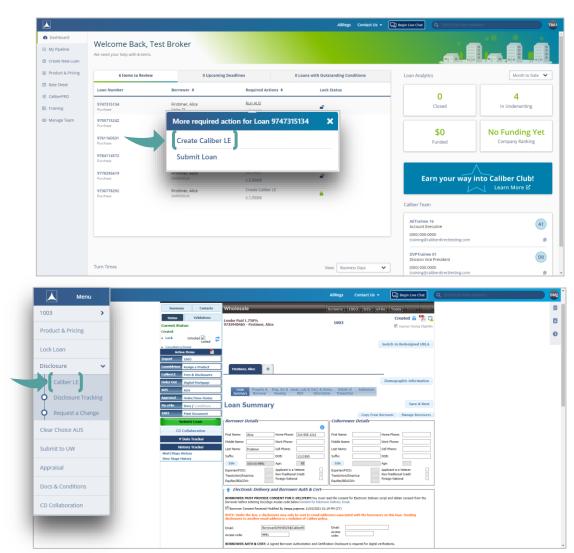
Broker Portal: Caliber LE

The **Caliber LE** provides a simplified and intuitive workflow, with no unnecessary information on the screens guiding the user swiftly through each step in the proper order.

Step

1 Select Create Caliber LE

 From the dashboard, hover over Required Action and select Create Caliber LE; when in a loan, select Caliber LE under disclosures.



• Caliber LE can only be run if the loan has a product assigned.

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Step 2 Click Run Fee Quote. Run Fee Quote appears when all required fields are complete. Menu AllRegs Contact Us 👻 💭 Begin Live Chat Primary Borrower Lock Status Firstimer, Alice 🔒 Expires 11/09/2020 Loan Stage Created 252 Loan Number 9791075246 1003 > Getting Started 菖 Product & Pricing Key Dates View / Edit Lock C Est. Close Date * Est. Fund Date * First Paym 11/06/2020 11/06/2020 11/1/2021 First Payment Date Disclosure > Clear Choice AUS Delivery Method Submit to UW DocuSign USPS By continuing with DocuSign as the selected delivery method, you are indictaing tha the borrower consents to electronic delivery. Appraisal Docs & Conditions Product & Rate Interest Rate 4.75% interest rate with 0.575% / \$1135.63 Lender Credit Current Product Conforming Fixed 30 - CF30 🔒 Caliber LE Price Breakdown Adjustment Description Price (%) Base Price 1.075 > Total Price Adjustment 0.5 Final Price 0.575 Appraisal Services > Will a rush order be required for the appraisal? * O Yes 🔿 No > Is the subject property a complex property? * O Yes 🔿 No

3 Add Services (optional)

- Click **Add Service** to select from services to be added.
- Only SSP's that are manually added can be removed.

Menu					AllRegs Con	tact Us 👻 💭 Begin Live Chat	Q Search for loan numbe	rs 🖉
oan Number 9791075246		ry Borrower ner, Alice	Lock Status Expires 11/09/2020	Loan Stage Created 266				
003 Product & Pricing	>	Getting Starte	d	Click the star i	con to designate SSP	as a favorite.		Go Back Next
iew / Edit Lock		Settlement	Service Providers					O Add Service
Disclosure	>	Provider Ty	be and a second s	Provider	Location	Proximity to Subject (r	ni) Fee Amount	More optio
Clear Choice AUS		Appraisal Fe	2	Caliber Home Loans - Appraisal Fee Schedule	1234 All American Way Irving, TX 75063	854.65	\$450.00	*
Submit to UW		Settlement S	ervices	Total Title Services, LLC	1234 All American Way Osseo, WI 54758	21.86	\$440.00	Select Different Provider
ppraisal		Title Insuran	ce	Total Title Services, LLC	1234 All American Way Osseo, WI 54758	21.86	\$1,530.00	☆
Docs & Conditions	5							
D Collaboration					Click ".	" to select a	different pro	vider. If SSP
					is not	found, selec	t closest prov	vider and a
					Custo	m SSP can ac	lded on the f	ees screen.

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Broker Portal: Caliber LE, cont.

Step

4 Add Fees (optional)

- Click **Add Fees** to add fees. Fee modal allows for multiple fees to be selected at once.
- Click "..." to Edit, Split, Add Custom SSP, or Remove fees.

u Primar	ry Borrower Lock Status	Loan Stage			AllRegs	Contact Us 🝷	🖵 Begin Live Chat	Q Search for	loan numbers
	Section A cannot		ed.						Add Fees Go Back
	By continuing to the next step, you a	cknowledge that you have	disclosed all customary f	ees or other fees to the transaction	in section "H. Other	Fees"			
>	✓ A. Origination - \$949.00 (2)								
AUS	Туре	APR	Paid To	Paid By		Points		Due at Closing	Total
1	DISCOUNT FEE		Lender	Borrower				\$0.00	\$0.00
	Loan Origination Fee		Lender	Borrower				\$949.00	\$949.00
ions									
ion	♥ B. Services Borrower Cannot	t Shop For - \$641.49 (5)							
	Туре	APR	Paid To	Paid By	Points		POC	Due at Closing	Total
	Appraisal Fee		Lender	Borrower			\$525.00	\$0.00	
	Credit Report Fee		Other	Borrower			\$0.00	\$0.00	Edit
	Flood Certification		Lender	Borrower			\$0.00		Split
	MERS		Lender	Borrower			\$0.00	\$11.95	Add Custom SSF
	Tax Service Fee An	y fees with	a \$0.00 a	re highlighted	l in red		\$0.00	\$93.89	Remove
	Does your company (ount be enter) Yes
	✓ C. Services Borrower Can Sh					_			

5 Add Taxes and Insurance (optional)

	mer, Alice	s Loan Stage s 11/09/2020 Created 266						
1003	Getting Started > Fees	> Taxes & Insurance					Go Back Next	
Product & Pricing								
View / Edit Lock	Taxes						Add Taxes	C
Disclosure >	Туре	Impounds	Monthly Amount	Annual Amount	Prepaid Months/Total	Escrow Months/Total	TE	
Clear Choice AUS	City	Taxes And Insurance	\$179.66	\$2,155.94	00 / \$0.00	01 / \$179.66	Yes	
Submit to UW	Insurance						Add Insurance	1
Appraisal	Insurance						Aud insurance	
Docs & Conditions	Туре	Impounds	Installment Due Date	Monthly Amount	Annual Amount	Prepaid Months/Total	Escrow Months/Total	
CD Collaboration	Homeowners	Taxes And Insurance	11/27/2021	\$75.00	\$900.00	12 / \$900.00	03 / \$225.00	
CD Collaboration							Aggregate Adjustment Total: -\$150.	00
	Days of Interest							
	Duration		Amount per Day	To	tal	Paid By		
	-372 days		\$26.06	-\$	9,694.32	Borrower	~	
Go	to table of	contents						



Step

- 6 Enter Prorations & Adjustments (optional)
- Click Add Adjustment to add any adjustments to the loan.

Loan Number 9725940465		ny Borrower Lock St mer, Alice 🔒 Un				AllRegs	Contact Us 👻 🛄 Begin	Live Chat Q. Search for loan nur	nbers 🧾
1003 Product & Pricing	>			> Prorations & Adjustments					Go Back Next
Lock Loan			prorations or adjustments they own the Property.	s. Prorations and adjustments fairly o	livide property expenses betwe	en the Buyer and Seller so that each party is pay	ving	Add Adjustment	B
Disclosure	>	Adjustment Type			Total	Paid From/To			
Clear Choice AUS		Tax Proration		~	\$ 500	Paid from Borrower	~	×	
Submit to UW						Paid to Borrower		\$	
Appraisal		Net Total						•	
Docs & Conditions									
CD Collaboration						Datal from the		_	
				nt types for dropdown.		Paid from/to appropriate fiel adjustmen	ld based or	1	

7 Review Preview LE

Click Next.

📥 Menu				AllRegs Contact Us - 💭 Begin Live Chat Q Search for Ic	
		y Borrower Lock Status Loan Stage her, Alice 🔒 Unlocked Created 232			
03	>	Getting Started > > Taxes & Insurance > Prorations & Adjustments > Preview LE			Next
oduct & Pricing				_	
k Loan		Loan Costs		Other Costs	
losure	>	A. Origination Charges	\$949.00	E. Taxes and Other Government Fees	\$60.00
ar Choice AUS		DISCOUNT FEE	\$0.00	Recording Fees and Other Taxes	\$60.00
		Loan Origination Fee	\$949.00	F. Prepaids	\$557.86
omit to UW		B. Services Borrower Cannot Shop For	\$2,141.49	Hazard Insurance Premium 12 months	\$0.00
raisal		Appraisal Fee	\$525.00	Prepaid Interest \$13.61 per day for 26 days @ 3.50%	\$0.00
s & Conditions		Credit Report Fee	\$0.00	G. Initial Escrow Payment at Closing	\$564.44
ollaboration		Flood Certification	\$10.65	Hazard Insurance \$17.00 per month for 3 mo.	\$0.00
CONTROLLER		MERS	\$11.95	Property Taxes \$171.15 per month for 3 mo.	\$0.00
liber LE		Mortgage Insurance Premium	\$1,500.00	Property Taxes \$177.15 per month for 5 mo.	\$0.00
		Tax Service Fee	\$93.89	H. Other Fees	\$573.00
		C. Services Borrower Can Shop For	\$2,156.50	Title - Owner's Title Insurance	\$573.00
		Title - Closing Protection Letter	\$50.00	I. TOTAL OTHER COSTS (E+F+G+H)	\$1,755.30
		Title - Closing/Settlement/Attorney Fee	\$580.00		
		Title - Doc Processing Fee	\$160.00	J. TOTAL CLOSING COSTS	\$7,002.29
		Title - Lender Title Insurance	\$1,079.00	D+I	\$7,002.29
		Title - Loan Tie In Fee	\$87.50	Lender Credits	\$0.00
		Title - Title Endorsement	\$200.00		
				Calculating Cash to Close	
		D. Total Loan Costs (A+B+C)	\$5,246.99	Total Closing Costs	\$7,002.29
				Closing Costs Financed (Paid from your loan amount)	- \$0.00
				Down Payment/Funds from Borrower	+ \$20,000.00
				Deposit	- \$0.00

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Step

8 Answer Additional Caliber Disclosures Questions Selecting Yes can open additional questions.

📐 Menu				AllRegs Contact Us 🗸	Q Search for loan num	ibers 🕕
Loan Number 9791075246		ry Borrower Lock Status Loan Stage ner, Alice 🔒 Expires 11/09/2020 Created 266				
1003	>	Getting Started > > Prorations & Adjustments > Previous	ew LE > Additional Caliber Disclosures			k Next
Product & Pricing		Do you want to include Mortgage Broker Fee/Compensation Agre	errent in the Californi C Destance 1			B
View / Edit Lock		Yes No	ement in the Caliber LE Packager "			0
Disclosure	>	Do you want to include Anti-Steering disclosure in the Caliber LE i	Package? *			
Clear Choice AUS		• Yes • No By selecting yes, I acknowledge that it is my responsibility to ensu	re that, when required, the information is updated to accurately	represent the options available	e to	
Submit to UW		the borrower as required by Regulation Z.				
Appraisal		Category	Interest Rate		Origination Charges Minus Lender Credi	t
Docs & Conditions		Lowest Interest Rate	0 %		\$ 0	
CD Collaboration		Lowest Interest Rate & No Risky Features 🜒	0 %		\$ 0	
		Lowest Total Origination Points & Fees 🜒	0 %		\$ 0 If this is a credit, type "-" before the number.	
		Terms of Your Loan Selection	4.75%		\$-236.63	
		In order to see the current pricing, click the link below. Product & Pricing →	Links will take you into	H2O to find	product & pricing.	

9 Upload Additional Broker Disclosures (optional) If not uploading skip to step 12. • Click **Browse** to upload from your computer or utilize drag and drop.

al) li not	Click Upload.
ep 12.	

Menu		AllRegs Contact Us - Dispoin Live Chat Q. Seatch for learn numbers	
n Number 25940465	Primary I Firstime	Borrower Lock Status Lean Stage r, Alice 🔒 Unlicked Created 20	
103	>	Getting Started > > Preview LE > Additional Caliber Disclosures > Additional Broker Disclosures Get	Back Next
oduct & Pricing			
ck Loan		Be sure to review and/or add Docusign fields to your uploaded documents	
closure	>		
sar Choice AUS		Optionally upload additional broker disclosures.	
abmit to UW			
ppraisal			
ocs & Conditions		Drag & Drop Files Here	
D Collaboration		Supported file types: PDF, TIF, TIFF, PNG, JPG, JPG	
		Test Documents.pdf	
		Uploaded Documents	
		Name Time Uploaded (CT) No Documents have been uploaded yet.	

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C+c

Menu							AllReg	s Contact Us 👻	Begin Live Chat	Q Search for loan	numbers	
	rimary Borrower irstimer, Alice	Lock Status	Loan Stage Created 243									
1003	> Getting Star	ed > > Prev	iew LE > Additional C	aliber Disclosures	> Additional Bro	ker Disclosures					[Go Back Nex
Product & Pricing	_											
Lock Loan	A Be su	e to review and/or ad	ld Docusign fields to your	uploaded docume	ents							
Disclosure	>											
Clear Choice AUS	Optionally	upload additional br	oker disclosures.									
Submit to UW												
Appraisal							*					
Docs & Conditions							& Drop Files Here s: PDF, TIF, TIFF, PNG,	10.0 10.0				
CD Collaboration						supported nie type	Browse	JPG, JPEG				
							browse					
	Uploaded	Documents										

11 Add DocuSign signature fields and Interpretation click Save (optional)

Click Save.



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	Jiep				
Generate	Disclosures	 Click Generate Disclosure. 			
Menu			AllRegs Contact Us 👻 🖵 Begin Live Chat	Q Search for loan numbers	DN
	nary Borrower Lock Status Loan Stage timer, Alice 🔓 Unlocked Created 243				
1003	Getting Started > > Additional Caliber Disc	osures > Additional Broker Disclosures > Generate Disclosures		Generate Disclosure	ì
roduct & Pricing					2
ock Loan	Delivery Method - DocuSign Primary Borrower Email *	DocuSign Access Code *			
isclosure >	· ·	540529@CaliberB 🗸			
lear Choice AUS		Default is last four digits of SSN			
ubmit to UW	Previously Requested Disclosures				
ppraisal	Disclosure Status	Time Requested (CT)	APR		
ocs & Conditions	O Generating We'll let you know once this is done.	11/03/2021, 1:19 PM		Void Disclosure	1
D Collaboration		Click on link (if applica	bla) to answer any		
	Questionnaire There are no questions that require your attention.	-			
	mere are no questions and require your attention.	pending Questionnair	e questions in H2O.		

13 Clear Global Errors (if applicable) • Click on error to be taken into H2O to resolve.

Menu					AllRegs	Contact Us 👻	Begin Live Chat	Q Se		
Loan Number 9725940465		ry Borrower Lock Status mer, Alice 🔒 Unlocked	Loan Stage Created 247							
1003 Product & Pricing	>		nal Caliber Disclosures > Additional	Broker Disclosures > Generate Disclosures				_	Global Errors New Construction Sele	Revalidate
Lock Loan		Delivery Method - DocuSign Primary Borrower	Email *	DocuSign Access Code *				-	made.	
Clear Choice AUS	>	Alice Firstimer	BorrowerID4540529@CaliberB 🗸	9991 Cefault is last four digits of SSN					C	
Submit to UW		Previously Requested Disclosure	s							
Appraisal		Disclosure Status		Time Requested (CT)		APR				
Docs & Conditions		× Voided		11/03/2021, 1:19 PM		-				
CD Collaboration		Questionnaire There are no questions that require y	our attention.							

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Ste	ер									
Save and Rea applicable)	validate (if	■ In (ave and then lick Next to s s.						
Menu				AllRe	gs Contact Us 👻	💭 Begin Live Chat	Q Search for loan	numbers		Î Î
1003 >			N E Caliber	D Begin		Contact Us Log Out Search: Go Advanced Search e Dashboard Resources	• Ne	er Construction Selection has	-	date
Lock Loan		Summary Contacts	Wholesale	Scree	ns 1003 DIS eF					U
Disclosure >		Status Validations Current Status:	Lender Paid 1.750% 9725940465 - Firstimer, Alice	10	03	Created 🔓 📆 🗔				
Clear Choice AUS		Created Lock Unlocked								
Submit to UW		Cancellation/Denial Action Items				Switch to Redesigned URLA				
Appraisal		Import 1003 LoanAdvisor Assign a Product	Firstimer, Alice +							
Docs & Conditions		Calibert.E Fees & Disclosures Order Out Digital Mortgage			(Demographic Information				
Docs & Conditions		Calibert E Fees & Disclosures		A	IRegs Contact Us 🛩		, Search for loan n	umpers		DMJ
		Calibert E Fees R. Disclosures Order Out Digital Hortgage Loe				Q Begin Live Chat	, Search for loan n	umbers		DMU
Menu Lean Number 9725940465 Firstme	er, Alice 🔒 Unlocked	Calaert: Fees & Disclosures Order Out: Digital Horigage	on the icon	to collapse o	or expan	्रा Begin Live Chat (य d the		umbers		1 -
Menu Lean Number 9725940465 Firstme		Calaert: Fees & Disclosures Order Out: Digital Horigage	on the icon		or expan	्रा Begin Live Chat (य d the		Wabers D Add Fees		
Menu Lean Number Primary 9725940465 Firstime 1003 > Product & Pricing	er, Alice 🔒 Unlocked	Catherit Pees & Diuclosures Order Out Digital Horigage	on the icon Global Erroi	to collapse o r menu to Re	or expand validate.	्रा Begin Live Chat (य d the		Vrobers O Add Fees	Next	
Menu Lean Number Primaryl 9725940465 Pristime 1003 > Product & Pricing	r, Alice Lunlocked	Catherit Pees & Diuclosures Order Out Digital Horigage	on the icon Global Erroi	to collapse o r menu to Re	or expand validate.	्रा Begin Live Chat (य d the		Umbers D Add Fees		8
Menu Lean Number 9725940465 Primary 1003 > Product & Pricing Lock Lean	r, Alice Lunlocked Getting Started > Fees By continuing to the next step. you a	Catherit Pees & Diuclosures Order Out Digital Horigage	on the icon Global Erroi	to collapse o r menu to Re	or expand validate.	C) Sign Live Char Q		O Add Fees	Nort	8
Menu Lean Number Primaryl 9725940465 Pristime 1003 > Product & Pricing Lock Lean Disclosure >	r, Alce Unlocked Getting Started > Fees By continuing to the next step. you a A. Origination - \$1.00 (2)	Catalence: Teres & Disclosures Order Out Digital Hortgage Las Cre Click chrowledge that you have disclose	on the icon Global Erroi	to collapse or menu to Re	or expand validate.	C Begin Live Char C			(Nucl 	8
Menu Lean Number Primary 9725940465 Primary 1003 > Product & Pricing Lock Loan Disclosure > Clear Choice AUS	r, Alice ↓ Uniocked Getting Started > Fees By continuing to the next step, you a ↓ A. Origination - \$1.00 (2) Type	Catalenti Pere a Diucosures Order Out Digital Horigage	on the icon Global Erroi ed all customary fees or other fe Paid To	to collapse of r menu to Re es to the transaction in section "H. Paid By	or expand validate.	C Bogin Live Char Char d the	ue at Closing	Total		8

15 View Error Report (if applicable)

Click View Error Report to clear any Mavent failures before generating disclosures.

Menu						AllRegs	Contact Us 👻	🖵 Begin Live Chat	Q Search for loan numbers	
Loan Number 9725940465		y Borrower her, Alice	Lock Status	Loan Stage Created 247						
1003	>	Getting Started	> > Additi	onal Caliber Disclosures > A	dditional Broker Disclosures > Generate Disclosures				Go Back	Generate Disclosure
Product & Pricing										
Lock Loan		Delivery Meth	-							
Disclosure		Primary Borrowe Alice Firstimer		Email * BorrowerID4540529@Calib	erBlaci 9991					
Disclosure	*	Allee Histimer		BorrowenD4540525@callb	Default is last four digits of SSN					
Clear Choice AUS										
Submit to UW		Previously Red	uested Disclosur	es						
Appraisal		Di	sclosure Status		Time Requested (CT)		APR			
Docs & Conditions		0 Co	uldn't be generated		11/08/2021, 2:10 PM		-		View Error Report ☐ View	ew Error
CD Collaboration		× vo	ided		11/03/2021, 1:19 PM					
		Questionnaire								
		There are no qu	estions that require	your attention.						

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	Step					
6 Generate	Disclosures	Click	Generate Disclosur	e.		
Menu				AllRegs Contact Us 👻 💭 Begin Li	ve Chat Q. Search for loan numbers	
		Loan Stage Created 243				
1003	Getting Started > > Additional	Caliber Disclosures > Additional B	Broker Disclosures > Generate Disclosures			Generate Disclosure
Product & Pricing						
Lock Loan	Delivery Method - DocuSign	nail *	Develop Assess Code 8			0
Disclosure >	· · · · · · · · · · · · · · · · · · ·	BorrowerID4540529@CaliberB 🗸	DocuSign Access Code * 9991			
Clear Choice AUS			Default is last four digits of SSN			
Submit to UW	Previously Requested Disclosures					
Appraisal	Disclosure Status		Time Requested (CT)	APR		
Docs & Conditions	O Generating We'll let you know once this is done.		11/03/2021, 1:19 PM		Void Disclosure	
CD Collaboration		C	ick on link (if annli	cable) to answer ar	214	
	 Questionnaire There are no questions that require you 	r attention				
	There are no questions interrequire you	pe	ending Questionna	ire questions in H2	0.	

17 View and Send Disclosures

• Option to Void Disclosure, View, and Send are available.

📐 Menu						Q Search for loan numbers	мјј
Loan Number 9725940465		ry Borrower Lock Status mer, Alice 🔒 Unlocked	Loan Stage Created 243	Message appears w	hen disclosures are	 Disclosure successfully generated for loan #9725940465 Firstimer. Preview & Send 	
1003	>	<u>Getting Started</u> > > <u>Additi</u>	onal Caliber Disclosures >	ready to go out, even	when in another loan.	Disclosure	1
Product & Pricing							B
Lock Loan		Delivery Method - DocuSign Primary Borrower	Email *	DocuSign Access Code *			0
Disclosure	>	Alice Firstimer	BorrowerID4540529@Ca				
Clear Choice AUS				Default is last four digits of SSN			
Submit to UW		Previously Requested Disclosur	es				
Appraisal		Disclosure Status		Time Requested (CT)	APR		
Docs & Conditions		Ready to Send		11/03/2021, 1:19 PM	3.69	Void Disclosure 🖉 View 🖌 Send	
CD Collaboration		Questionnaire					
		There are no questions that require	your attention.				

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