

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.
- »»» [H2O](#) Additional menus and options to make working on loans more efficient.
- »»» [Caliber LE](#) Provides users a simplified and intuitive workflow for generating the Caliber LE.

Broker Portal: Logging In



To access the Broker Portal go to blueprint.caliberwholesale.com 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

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

Caliber Team

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.

Welcome Back, Siddhartha Roy
We need your help with 4444 Items.

1733 Items to Review | **45 Upcoming Deadlines** | **236 Loans with Outstanding Conditions**

Loan Number	Borrower	Required Actions	Lock Status
9730804045 Purchase	Firstimer, Alice New Orleans, LA	Review Active Alerts & Stops + 1 more	🔒
9735965874 Construction-Permanent	Firstimer, Jim BEVERLY HILLS, CA	Lock Loan + 2 more	🔒
9707991015 Purchase	Firstimer, Alice New Orleans, LA	Review Active Alerts & Stops + 1 more	🔒
9754035906 Purchase	FACREDCOAZ, DOUG SANTA ANA, CA	Review Active Alerts & Stops	🔒
9739073303 Purchase	Homeowner, John San Francisco, CA	Lock Loan + 2 more	🔒
9700232755 Refinance	Firstimer, Alice SANTA ANA, CA	Review Active Alerts & Stops + 1 more	🔒
9741995477 Purchase	FIRSTIMER, ALICE BEVERLY HILLS, CA	Borrower To eSign LE + 2 more	🔒
9737122912 Purchase	Firstimer, Alice Metairie, LA	Review Active Alerts & Stops + 2 more	🔒

Loan Analytics (Month to Date)

- 16 Closed
- 605 In Underwriting
- \$2M Funded
- N/A Company Ranking

Earn your way into Caliber Club!
[Learn More](#)

Caliber Team

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Account Executive
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- Daniel Luszowski
Client Relations Manager
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Daniel.Luszowski.CaliberBlackHawkUAT1.chi@mailinator.com **DL**

Turn Times (View: Business Days)

Loan Registration	Underwriting	Conditions	Initial CD	Closing Docs
Purchase	Business Days	Refinance	Business Days	
Conventional	3	Conventional	3	
FHA	3	Sprint	1	
VA	3	FHA	3	
USDA	3	VA	3	
Jumbo	3	USDA	3	
		Jumbo	3	

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 an 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.

Click any of the "Call to Action" tabs to see loans that have Items to Review, Upcoming Deadlines, or Outstanding Conditions.

Loan Number	Borrower	Required Actions	Lock Status
9730804045	Firsttimer, Alice New Orleans, LA	Review Active Alerts & Stops + 1 more	🔒
9735965874	Firsttimer, Jim BEVERLY HILLS, CA	Lock Loan + 2 more	🔒
9707991015	Firsttimer, Alice New Orleans, LA	Review Active Alerts & Stops + 1 more	🔒
9754035906	FACREDCOAZ, DOUG SANTA ANA, CA	Review Active Alerts & Stops	🔒
9739073303	Homeowner, John San Francisco, CA	Lock Loan + 2 more	🔒
9700232755	Firsttimer, Alice SANTA ANA, CA	Review Active Alerts & Stops	🔒
9741995477	FIRSTIMER, ALICE BEVERLY HILLS, CA	Order Appraisal	🔒
9737122912	Firsttimer, Alice Metairie, LA	Review Active Alerts & Stops + 2 more	🔒

236 Loans with Outstanding Conditions

Loan Analytics: 1 Closed, 582 In Underwriting

Click on the hyperlinks to open the task, or loan, in H2O. Hover over the link for additional Required Actions.

Here comes the new wave of mortgage lending

Use the dropdown to toggle between MTD, YTD, and All time.

Loan Number	Borrower	Required Actions	Lock Status
9730804045	Firsttimer, Alice New Orleans, LA	Review Active Alerts & Stops + 1 more	🔒
9735965874	Firsttimer, Jim BEVERLY HILLS, CA	Lock Loan + 2 more	🔒
9707991015	Firsttimer, Alice New Orleans, LA	Review Active Alerts & Stops + 1 more	🔒
9754035906	FACREDCOAZ, DOUG SANTA ANA, CA	Review Active Alerts & Stops	🔒
9739073303	Homeowner, John San Francisco, CA	Lock Loan + 2 more	🔒
9700232755	Firsttimer, Alice SANTA ANA, CA	Review Active Alerts & Stops + 1 more	🔒
9741995477	FIRSTIMER, ALICE BEVERLY HILLS, CA	Borrower To eSign LE + 2 more	🔒
9737122912	Firsttimer, Alice Metairie, LA	Review Active Alerts & Stops + 2 more	🔒

1733 Items to Review, 45 Upcoming Deadlines, 236 Loans with Outstanding Conditions

Loan Analytics: 16 Closed, 605 In Underwriting, \$2M Funded, N/A Company Ranking

Contact info is available for your AE, their manager, and support team members.

Here comes the new wave of mortgage lending

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Broker Portal: Dashboard, cont.

Utilize the dropdown to toggle between Business Days and Current Review Date.

**Some loan applications are not suited for digital delivery of asset, income, employment, and other documentation required for loan approval. Processing and closing times vary depending on the nature and complexity of the transaction.*

Turn Times View: Business Days ▾

Loan Registration		Underwriting		Conditions		Initial CD		Closing Docs	
Purchase		Business Days	Refinance		Business Days				
Conventional		3	Conventional			3			
FHA		3	Sprint			3			
VA		3	FHA			3			
USDA		3	VA			3			
Jumbo		3	USDA			3			
			Jumbo			3			

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Broker Portal: MyPipeline



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.

<p>Action Items</p> <p>Displays loans that need attention.</p>	<p>All Loans</p> <p>Displays all active, non-funded loans.</p>	<p>Expiring Locks</p> <p>Default display shows any active loan with a lock that is expiring in the next 7 days.</p>
<p>Pending Submission</p> <p>Loans that have been created but not submitted to Caliber.</p>	<p>Upcoming Closings</p> <p>Default shows loans that have an estimated closing date in the next 7 days.</p>	<p>Funded</p> <p>Displays all loans that have funded in the last 30 days.</p>

The screenshot shows the 'My Pipeline' dashboard. At the top, there are tabs for 'All Loans (895)', 'Expiring Locks (47)', 'Pending Submissions (848)', 'Upcoming Closings (3)', and 'Funded (3)'. Below the tabs is a table with the following columns: Loan Number, Loan Amount, Estimated Closing, Outstanding Conditions, Number of Outstanding Conditions, and Upcoming Deadlines. The table contains several rows of loan data, including purchase and refinance loans with various loan amounts and closing dates.

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Broker Portal: MyPipeline, cont.

The screenshot shows the 'My Pipeline' dashboard. On the left is a navigation menu with options like 'Dashboard', 'My Pipeline', 'Create New Loan', 'Product & Pricing', 'Rate Sheet', 'CaliberPRO', 'Training', and 'Manage Team'. The main area is titled 'My Pipeline' and features a table of 'Action Items (895)'. A dropdown menu is open over the table, showing 'All Action Items (895)'. A callout box points to this dropdown with the text: 'Utilize dropdown for additional filter options.' Another callout box points to a table configuration panel on the right, which includes options for 'Default Tab', 'Column Options', and 'Filters'. This panel shows columns for 'Number of Outstanding Conditions' and 'Upcoming Deadlines'. A second callout box explains: 'Options allow you to set as a default tab, add/remove columns, filter, and export to excel.' The background table lists loan details such as Loan Amount, Estimated Closing, and Borrower information.

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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.

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.

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Broker Portal: Create New Loan, cont.

Step

3 Select Loan Type & Loan Product (optional)

- Dropdowns will show all loan types and products.
- **Recent Product** will show the 5 most recently used products.

Dashboard | AllRegs | Contact Us | Begin Live Chat | Search for names

Create New Loan [Previous] [Next]

Assign a Product (Optional) Primary Borrower: Alice Firstimer

Loan Type
All Types

Loan Product
Select

Lender-Paid Include Lender 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 Fixed 30 2-1 Buydown

4 Upload Submission Package (optional)

Dashboard | AllRegs | Contact Us | Begin Live Chat | Search for names

Create New Loan [Previous] [Next]

Upload Submission Package (Optional) Primary Borrower: Alice Firstimer

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.

Loan Number	Primary Borrower	Loan Stage	Originator	Creation Date	Address	Unit	City	State	Zip
1003401795	Alice, Firstimer	Cancelled	Jones, Joe	01/11/2021	6559 Louisville St		New Orleans	LA	70124-3223
1008276884	Alice, Firstimer	Cancelled	Jones, Joe	02/09/2021	6559 Louisville St		New Orleans	LA	70124-3223
1035801217	Alice, Firstimer	Approved w / Conditions	Jones, Joe	04/08/2021	6559 Louisville St		New Orleans	LA	70124-3223
1038998948	Alice, Firstimer	Created	Jones, Joe	04/18/2021	9991 Warford		Dawson	IA	50066-1111
1049352679	Alice, Firstimer	Cancelled	Jones, Joe	01/14/2021	6559 Louisville St		New Orleans	LA	70124-3223

- 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.

6 of 6 Key Points of Data

Borrower Name	✓ Alice Firstimer
SSN / ITIN / PassportID	✓ XXX-XX-9991
Gross Monthly Income	✓ \$20,131.15
Appraised Value	✓ \$400,000
Loan Amount	✓ \$320,000
Subject Property Address	✓ 3516 Beverly Dr, Dallas, TX 75205-2802, Dallas

Property address was one of the points of data added to the loan. Please confirm one of the following:

This is a TBD and the borrower has not identified a property address for this transaction

The borrower has identified a property address for 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 I confirm I have received all 6 Key Points of Data

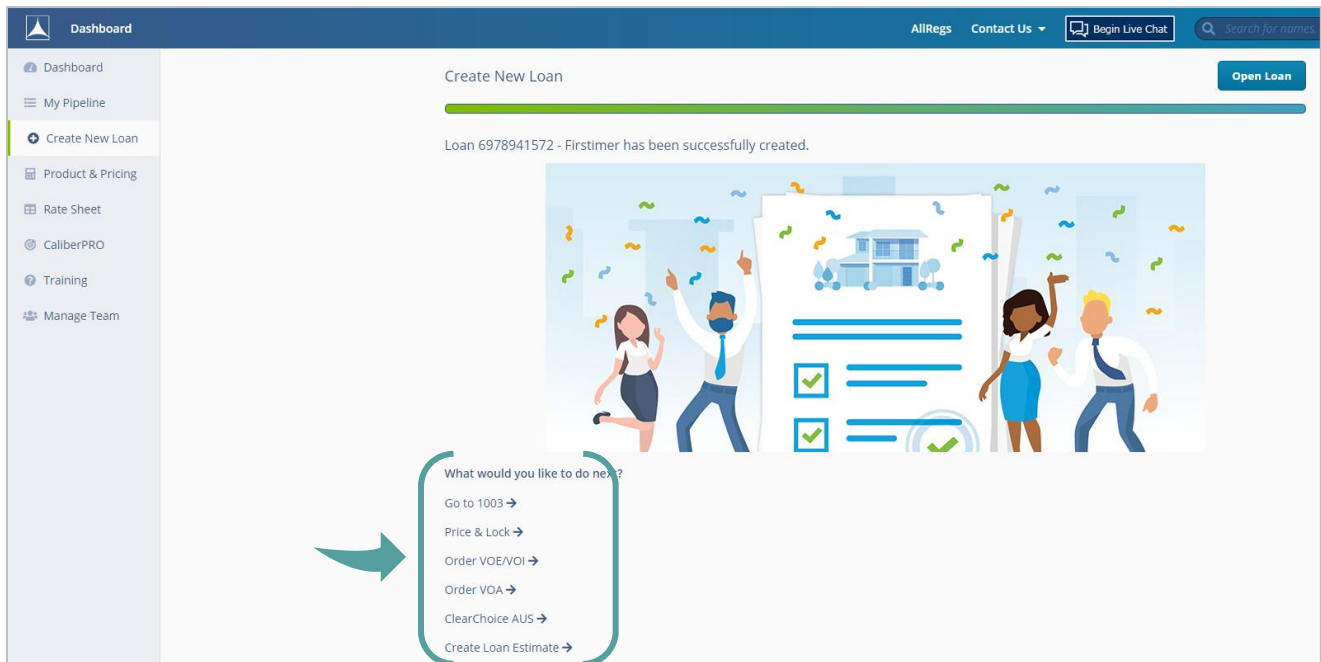
[Go to table of contents](#)

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.



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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](#)

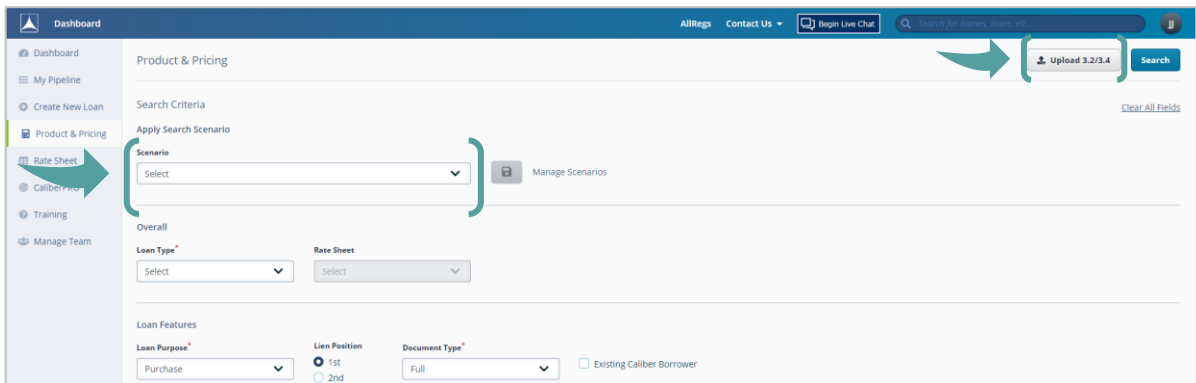
The screenshot displays the 'Product & Pricing' section of the Caliber Home Loans Broker Portal. The interface includes a navigation menu on the left, a search bar at the top right, and a main area with various filters and input fields. A blue callout box highlights the 'Loan Type' dropdown menu, which is expanded to show options: Conventional, FHA, VA, and USDA. A blue text box states: "Users can now search for more than one Loan Type in a single search."

Broker Portal: Product & Pricing (Lock Loan)

Step

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

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



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.

Product	Final Rate	Final Rate/Price	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

[Go to table of contents](#)

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.

The screenshot shows the 'Product & Pricing' section of the broker portal. At the top, there are fields for Base Loan Amount (\$400,000.00), Zip Code (75205-2802), DTN (30.000), and Escrow (Impound Taxes And Insurance). Below this is a table of 'Eligible Products' with columns for Product, Final Rate, Credit/Cost, Monthly P&I, and Monthly MI. The 'CF30 Conforming Fixed 30' product is highlighted, and a dropdown menu is open showing 'Lock', 'Assign', and 'Compare' options. Below the eligible products is a section for 'Ineligible Products' with columns for Product and Reason. Two products are listed as ineligible: 'CDRF30 Conforming Doctor/Physician Fixed 30' (reason: Minimum credit score is less than 720) and 'CHMPHF30 Conventional Conforming Home Possible High Balance Fixed 30' (reason: The loan amount \$320,000.00 exceeds guidelines).

4 Verify Lock Detail

- Complete required fields and click **Lock**.

The screenshot shows the 'Verify Loan Details' form for a Lock Loan. The form is divided into several sections: 'Primary Borrower' with fields for First Name (Alice), Last Name (Firstimer), and SSN (XXX-XX-9991); 'Property' with fields for Street Address (3516 Beverly Dr), Unit Type (dropdown), Zip Code (75205-2802), City (DALLAS), State (Texas), County (DALLAS), and No. of Units (1); and a 'Review Loan Details' section with a grid of loan information: Product Code (CF30), Product Description (Conforming Fixed 30), Lien Position (First), Loan Type (Conventional), Amortization Type (Fixed), Amortization Term (30 Year), Interest Only Years (N/A), and Temporary Buydown (N/A). There are 'Back' and 'Lock' buttons at the top right.

[Go to table of contents](#)

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

Step

- 5 Complete Address Verification**
- Select applicable radio button and then **Confirm**.

Address Verification ✕

USPS Verified Address

3516 Beverly Dr, Dallas, TX 75205-2802

Unverified Address

3516 Beverly Dr, DALLAS, TX 75205-2802

Cancel
Confirm

- 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
Search for names, loans, etc...

- Dashboard
- My Pipeline
- Create New Loan
- Product & Pricing
- Rate Sheet
- CaliberPRO
- Training
- Manage Team

Lock Loan

Lock Information

Primary Borrower Alice Firstimer	Borrower Address 3516 Beverly Dr DALLAS, TX 75205-2802 Dallas County	Product Type Conforming Fixed 30 - CF30
--	--	---

Lock Selection

Lock	Final Rate	Credit/Cost	Monthly P&I	Monthly MI	
30 Day	2.625%	(0.506%) / \$1,619.20	\$1,285.28	\$0.00	✓ Selected
45 Day	2.625%	(0.271%) / \$867.20	\$1,285.28	\$0.00	Select Lock
60 Day	2.625%	(0.236%) / \$755.20	\$1,285.28	\$0.00	Select Lock
		0.024% / (\$76.80)	\$1,285.28	\$0.00	Select Lock

Price Breakdown

Adjustment Description	Price(%)
Base Price	(2.456)
▶ Total Price Adjustment	1.95

Click "See More Rates" to view additional rate options.

Go to table of contents

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**.

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.

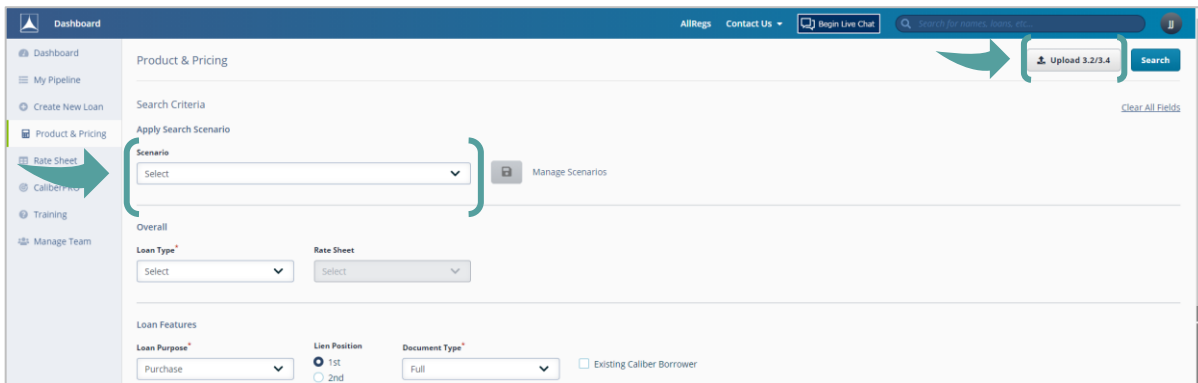
[Go to table of contents](#)

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

Step

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

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



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.

Product	Final Rate	P&I	Monthly MI
CF30 Conforming Fixed 30	2.625%	\$1,285.28	\$0.00
	2.25%	\$1,223.19	\$0.00

[Go to table of contents](#)

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.

The screenshot shows the 'Product & Pricing' section of the dashboard. It includes a summary card with loan details: Base Loan Amount (\$400,000.00), Zip Code (75205-2802), DTI% (30.000), and Escrow (Impound Taxes And Insurance). Below this is a table of 'Eligible Products' with columns for Product, Final Rate, Credit/Cost, Monthly P&I, and Monthly MI. A dropdown menu is shown over the 'Actions' column for the first product, with 'Assign' selected. Below the eligible products is a section for 'Ineligible Products' with columns for Product and Reason.

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
CHMPF30 Conforming Home Possible Fixed 30	2.625%	(0.506%)/\$1,619.20	\$1,285.28	\$0.00
CHRCF30 Conforming HomeReady Community Second Fixed 30	2.625%	(0.506%)/\$1,619.20	\$1,285.28	\$0.00
CHRF30 Conforming HomeReady Fixed 30	2.625%	(0.506%)/\$1,619.20	\$1,285.28	\$0.00

Product	Reason
CDRF30 Conforming Doctor/Physician Fixed 30	Minimum credit score is less than 720.
CHMPHBF30 Conventional Conforming Home Possible High Balance Fixed 30	The loan amount \$320,000.00 exceeds guidelines.

4 Verify Loan Details

- Complete required fields and click **Assign**.

The screenshot shows the 'Assign Loan - Verify Loan Details' form. It includes fields for Primary Borrower (First Name, Last Name, SSN), Property (Existing Caliber Borrower, Street Address, Unit Type, Zip Code, City, State, County, No. of Units), and Review Loan Details (Product Code, Product Description, Lien Position, Loan Type, Amortization Type, Amortization Term, Interest Only Years, Temporary Buydown).

Primary Borrower:
 First Name: Alice, Last Name: Firstimer, SSN: XXX-XX-9991

Property:
 Existing Caliber Borrower
 TBD
 Street Address: 3516 Beverly Dr
 Unit Type: .Select-, Zip Code: 75205-2802, City: DALLAS
 State: Texas, County: DALLAS, No. of Units: 1

Review Loan Details:
 Product Code: CF30, Product Description: Conforming Fixed 30, Lien Position: First, Loan Type: Conventional
 Amortization Type: Fixed, Amortization Term: 30 Year, Interest Only Years: N/A, Temporary Buydown: N/A

[Go to table of contents](#)

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

Step

- 5 Complete Address Verification** ■ Select applicable radio button and then **Confirm**.

Address Verification ✕

USPS Verified Address

3516 Beverly Dr, Dallas, TX 75205-2802

Unverified Address

3516 Beverly Dr, DALLAS, TX 75205-2802

Cancel
Confirm

- 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
Search for names, loans

- Dashboard
- My Pipeline
- Create New Loan
- Product & Pricing
- Rate Sheet
- CaliberPRO
- Training
- Manage Team

Assign Loan ➔ Assign

Verify Loan Details

Application Tracker

6 of 6 Key Points of Data

Borrower Name	✓	Alice Firsttimer
SSN / ITIN / PassportID	✓	XXX-XX-9991 👁
Gross Monthly Income	✓	\$20,131.15
Appraised Value	✓	\$400,000
Loan Amount	✓	\$320,000
Subject Property Address	✓	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 business days** of 04/29/2021.

Application Date

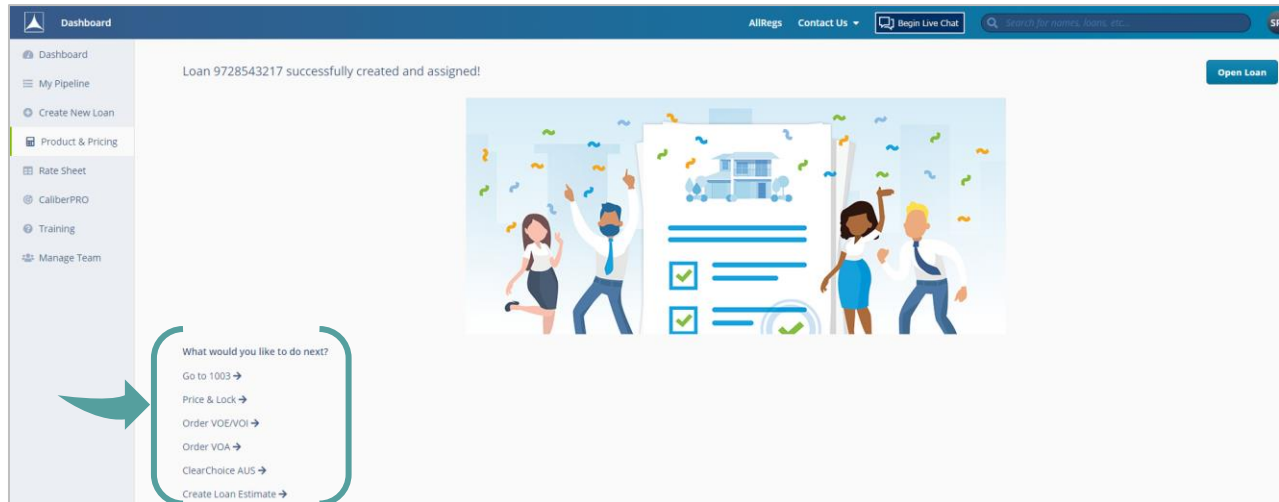
I confirm I have received all 6 Key Points of Data

[Go to table of contents](#)

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

Step

- 7 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.



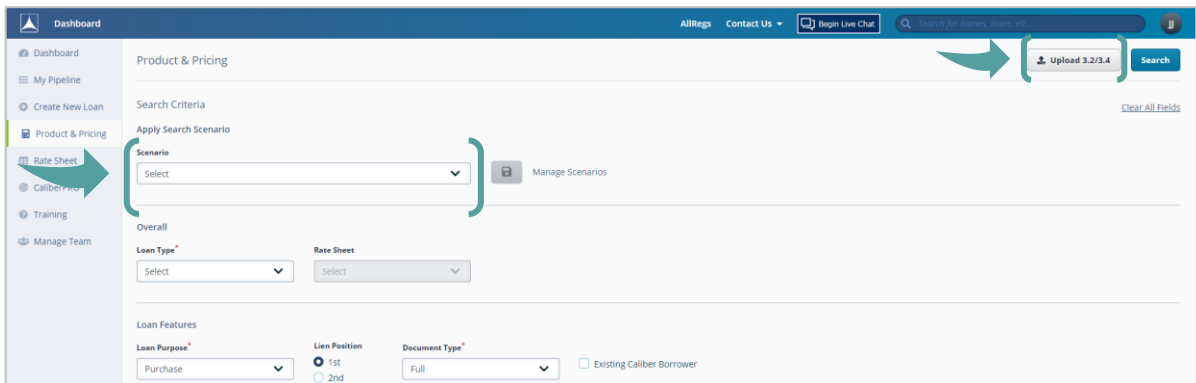
[Go to table of contents](#)

Broker Portal: Product & Pricing (Compare Products)

Step

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

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



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.

Product	Final Rate	P&I	Monthly MI
CF30 Conforming Fixed 30	2.625%	\$1,285.28	\$0.00
	2.25%	\$1,223.19	\$0.00

[Go to table of contents](#)

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

Step

- 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.

The screenshot shows the 'Product & Pricing' section of the Caliber Home Loans Broker Portal. The interface includes a sidebar with navigation options like 'Dashboard', 'My Pipeline', and 'Product & Pricing'. The main content area displays loan details such as 'Appraised Value', 'Sales Contract Price', and 'Down Payment %'. Below this, there is a table of 'Eligible Products' with columns for 'Product', 'Final Rate', and 'Credit/Cost'. A callout box highlights the 'Compare Products (2/5)' dropdown menu, which is triggered by hovering over a rate. The dropdown shows 'Priced 04/30/2021 12:08 PM CST', 'Monthly MI', and a list of products being compared. An 'Actions' dropdown is also visible, with options for 'Lock', 'Assign', and 'Compare'.

[Go to table of contents](#)

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

Step

- 4 **Select Assign or Lock Loan**
 - Click [here](#) if you select **Assign** to complete the Assign a Rate/Product process.
 - Click [here](#) if you select **Lock Loan** to complete the Lock Loan process.

Dashboard

- Dashboard
- My Pipeline
- Create New Loan
- Product & Pricing**
- Rate Sheet
- CaliberPRO
- Training
- Manage Team

Products Comparison Go back To Search Results

Product	Interest Rate	Cost/Credit Percent	Cost/Credit Amount	Monthly P & I	Monthly MI	Terms	Lock	Action
Conforming Fixed 30	2.625%	(0.506%)	\$1,619.20	\$1,285.28	\$0.00	30 Years	30 Days	Assign / Lock Loan
Conforming Home Possible Fixed 30	2.625%	(0.506%)	\$1,619.20	\$1,285.28	\$0.00	30 Years	30 Days	Assign / Lock Loan

[Go to table of contents](#)

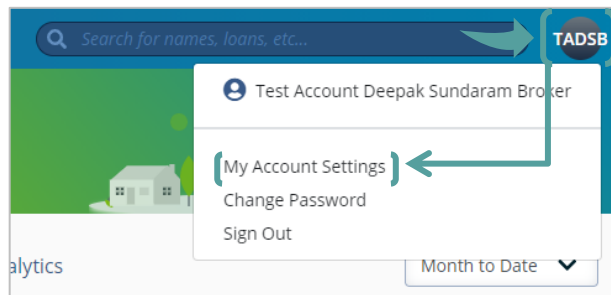
Broker Portal: My Account Settings



The **My Account Settings** feature allows users to set up certain details about their account within the Broker Portal.

Step

- 1 Click on your name icon and then **My Account Settings**



My Employee Details

Can enter NMLS license number and additional contact info.

Pipeline Access

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

Credit Vendor Credentials

Add/edit credit provider accounts to use when pulling credit.

Notifications

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

Save Changes

My Employee Details	Pipeline Access	Credit Vendor Credentials	Notifications								
<p>Account</p> <table style="width: 100%;"> <tr> <td style="width: 50%;">Account Username</td> <td style="width: 50%;">Employee Role</td> </tr> <tr> <td>Deepak.sundaram.broker</td> <td>Loan Officer</td> </tr> </table>				Account Username	Employee Role	Deepak.sundaram.broker	Loan Officer				
Account Username	Employee Role										
Deepak.sundaram.broker	Loan Officer										
<p>Name</p> <table style="width: 100%;"> <tr> <td style="width: 25%;">First Name</td> <td style="width: 25%;">Middle Name</td> <td style="width: 25%;">Last Name</td> <td style="width: 25%;">Suffix</td> </tr> <tr> <td>Test Account</td> <td></td> <td>Deepak Sundaram Broker</td> <td></td> </tr> </table>				First Name	Middle Name	Last Name	Suffix	Test Account		Deepak Sundaram Broker	
First Name	Middle Name	Last Name	Suffix								
Test Account		Deepak Sundaram Broker									
<p>License</p> <p>Originator NMLS License # <input style="width: 100%;" type="text" value="111111"/></p>											
<p>Contact</p> <table style="width: 100%;"> <tr> <td style="width: 33%;">Office Phone Number*</td> <td style="width: 33%;">Office Extension</td> <td style="width: 33%;">Cell Phone Number</td> </tr> <tr> <td><input style="width: 90%;" type="text" value="(000) 000-0000"/></td> <td><input style="width: 90%;" type="text"/></td> <td><input style="width: 90%;" type="text"/></td> </tr> </table> <p>Email Address* <input style="width: 100%;" type="text" value="deepak.sundaram@caliberhomeloans.com"/></p>				Office Phone Number*	Office Extension	Cell Phone Number	<input style="width: 90%;" type="text" value="(000) 000-0000"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>		
Office Phone Number*	Office Extension	Cell Phone Number									
<input style="width: 90%;" type="text" value="(000) 000-0000"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>									

[Go to table of contents](#)

Broker Portal: My Account Settings, cont.

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

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 | Suffix: Broker

License

Originator NMLS License #:

Contact

Office Phone Number: | Office Extension: | Cell Phone Number:

Email Address:

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

My Account Save Changes

Pipeline Access | My Employee Details | Credit Vendor Credentials | Notifications

Pipeline Access Settings

Show All 195 active employees

Employee Name	Can Access Test Account's Pipeline
AA-SOne AA-S-One	<input type="checkbox"/>
AA-S-THREE AA-S-THREE	<input type="checkbox"/>
AAA-Two AAA-TWO	<input type="checkbox"/>
AAAA AAAB	<input checked="" type="checkbox"/>
AAAC AAAD	<input checked="" type="checkbox"/>
AAEELEVEN AAEELEVEN	<input type="checkbox"/>
AAA-TEN AAATEN	<input type="checkbox"/>
AAATEN AAATEN	<input type="checkbox"/>

[Go to table of contents](#)

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 Password
<input type="text" value="▼"/>	<input type="text"/>	<input type="text" value="password"/>

[+ Add Another Account](#)

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

My Account Save Changes

My Employee Details | Pipeline Access | Credit Vendor Credentials | **Notifications**

[View Change History](#) — “View Change History” shows a list of what changes have been made.

General Notifications

- Receive Caliber Rate Sheets

Loan Notifications

Pre-Submission

Unselect All

- The FHA Case Number Request has been 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 borrower

Underwriting

Unselect All

- UW Decision Updated Handler
- Underwriting Approved Handler
- Loan is in Underwriting

Appraisal

Unselect All

- Appraisal update has been posted for Loan
- Reply to Appraisal Cancellation Request has been received for Loan
- Your appraisal is complete for Loan
- The appraisal for loan has received a communication

Checking notification boxes will enable LSN notifications for that specific event.

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Broker Portal: Advanced Search

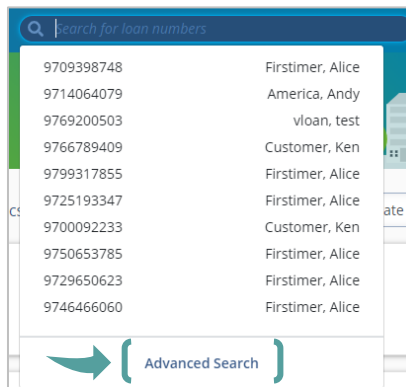


The **Advanced Search** feature allows users to search for existing loans within the Broker Portal using additional search criteria.

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.

[Go to table of contents](#)


Broker Portal: Advanced Search, cont.

Step





- 3** Select loan number from search results ▪ Click on  to modify the Search Criteria.

Advanced Search [Reset](#) [Search](#)

Search Criteria

Borrower First Name	Borrower Last Name	Property City	Loan Stage (From)	Loan Stage (To)	Property Type	
--	Firsttimer	--	--	--	--	

14 search results

Loan Number	Borrower	SSN	Property Address	Lock Status	Product	Loan Stage
4969050223 <small>Purchase</small>	Alice Firsttimer	XXX-XX-2222	3726 Poplar St. Dawson IA 50066	 2.75% Expires 07/22/2021	FF30	Created 41
8811242538 <small>Purchase</small>	Alice Firsttimer	XXX-XX-9991	3726 Poplar St. Dawson IA 50066-1111	 3.25% Not Locked	FF30	Created 42
8310156129 <small>Purchase</small>	Alice Firsttimer	XXX-XX-9999	3726 Poplar St. Dawson IA 92602	 2.75% Not Locked	FF30	Created 43
1506986636 <small>Purchase</small>	Alice Firsttimer	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  to expand the **Loan Summary** for more information about the Property, Loan, Underwriting details, or Borrower.
- Click on  to have the contact detail for the loan open in a new window.
- Click on  to expand the **Date Tracker** which provides key dates for the loan.

"Menu" allows to toggle between Global Menu and Loan Menu options.

[Go to table of contents](#)

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.

The screenshot shows the Caliber LE dashboard. A modal window is open over a table of loans, displaying 'More required action for Loan 9747315134'. The modal contains two buttons: 'Create Caliber LE' and 'Submit Loan'. A green arrow points from the 'Create Caliber LE' button in the modal to the 'Required Actions' column of the loan table. The dashboard also features a sidebar with navigation options, a top navigation bar, and several analytics cards on the right side.

The screenshot shows the Caliber LE loan summary page. A 'Disclosure' menu is open on the left side, with 'Caliber LE' highlighted. The main content area displays loan details for 'Lender Paid 1.750% 9725946465 - Firsttime, Alice'. The page includes sections for 'Loan Summary', 'Borrower Details', and 'Collaborator Details'. A green arrow points from the 'Caliber LE' option in the menu to the 'Disclosure' section of the page.

[Go to table of contents](#)

Broker Portal: Caliber LE, cont.

Step

- 2** Click Run Fee Quote.
- Run Fee Quote appears when all required fields are complete.

The screenshot shows the 'Getting Started' section of the Caliber LE portal. A green arrow points to a blue button labeled 'Run Fee Quote' in the top right corner of the main content area. The page displays loan details for Loan Number 9791075246, including key dates (Est. Close Date: 11/06/2020, Est. Fund Date: 11/06/2020, First Payment Date: 1/1/2021), delivery method (DocuSign), and product information (4.75% interest rate, Conforming Fixed 30 - CF30).

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

The screenshot shows the 'Settlement Service Providers' section. A blue callout box says 'Click the star icon to designate SSP as a favorite.' with an arrow pointing to a star icon in the 'More options' column. Another blue callout box says 'Click "..." to select a different provider. If SSP is not found, select closest provider and a Custom SSP can added on the fees screen.' with an arrow pointing to a three-dot menu icon. The table below lists providers for Appraisal Fee, Settlement Services, and Title Insurance.

Provider Type	Provider	Location	Proximity to Subject (mi)	Fee Amount	More options
Appraisal Fee	Caliber Home Loans - Appraisal Fee Schedule	1234 All American Way Irving, TX 75063	854.65	\$450.00	★ ...
Settlement Services	Total Title Services, LLC	1234 All American Way Osseo, WI 54758	21.86	\$440.00	Select Different Provider
Title Insurance	Total Title Services, LLC	1234 All American Way Osseo, WI 54758	21.86	\$1,530.00	★ ...

[Go to table of contents](#)

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.

Fees in Section A cannot be removed.

By continuing to the next step, you acknowledge that you have disclosed all customary fees or other fees to the transaction in section "H. Other Fees"

Type	APR	Paid To	Paid By	Points	Due at Closing	Total	
A. Origination - \$949.00 (2)							
DISCOUNT FEE	<input checked="" type="checkbox"/>	Lender	Borrower		\$0.00	\$0.00	...
Loan Origination Fee	<input checked="" type="checkbox"/>	Lender	Borrower		\$949.00	\$949.00	...
B. Services Borrower Cannot Shop For - \$641.49 (5)							
Appraisal Fee	<input type="checkbox"/>	Lender	Borrower		\$525.00	\$0.00	Edit Split Add Custom SSP Remove
Credit Report Fee	<input type="checkbox"/>	Other	Borrower		\$0.00	\$0.00	
Flood Certification	<input checked="" type="checkbox"/>	Lender	Borrower		\$0.00	\$0.00	
MERS	<input checked="" type="checkbox"/>	Lender	Borrower		\$0.00	\$11.95	
Tax Service Fee	<input type="checkbox"/>	Lender	Borrower		\$0.00	\$93.89	

Any fees with a \$0.00 are highlighted in red and require an amount be entered.

5 Add Taxes and Insurance (optional)

Type	Impounds	Monthly Amount	Annual Amount	Prepaid Months/Total	Escrow Months/Total	P/E
City	Taxes And Insurance	\$179.66	\$2,155.94	00 / \$0.00	01 / \$179.66	Yes

Type	Impounds	Installment Due Date	Monthly Amount	Annual Amount	Prepaid Months/Total	Escrow Months/Total
Homeowners	Taxes And Insurance	11/27/2021	\$75.00	\$900.00	12 / \$900.00	03 / \$225.00

Aggregate Adjustment Total: **-\$150.00**

[Go to table of contents](#)

Broker Portal: Caliber LE, cont.

Step

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

Optionally enter any prorations or adjustments. Prorations and adjustments fairly divide property expenses between the Buyer and Seller so that each party is paying only for the time which they own the Property.

Adjustment Type	Total	Paid From/To
Tax Proration	\$ 500	<input type="radio"/> Paid from Borrower <input type="radio"/> Paid to Borrower
Net Total	-	

Only available adjustment types for the loan will appear in the dropdown.

Paid from/to opens the appropriate field based on adjustment type.

- 7 Review Preview LE** ■ Click **Next**.

Loan Costs		Other Costs	
A. Origination Charges	\$949.00	E. Taxes and Other Government Fees	\$60.00
DISCOUNT FEE	\$0.00	Recording Fees and Other Taxes	\$60.00
Loan Origination Fee	\$949.00	F. Prepays	\$557.86
B. Services Borrower Cannot Shop For	\$2,141.49	Hazard Insurance Premium 12 months	\$0.00
Appraisal Fee	\$525.00	Prepaid Interest \$13.61 per day for 26 days @ 3.50%	\$0.00
Credit Report Fee	\$0.00	G. Initial Escrow Payment at Closing	\$564.44
Flood Certification	\$10.65	Hazard Insurance \$17.00 per month for 3 mo.	\$0.00
MERS	\$11.95	Property Taxes \$171.15 per month for 3 mo.	\$0.00
Mortgage Insurance Premium	\$1,500.00	H. Other Fees	\$573.00
Tax Service Fee	\$93.89	Title - Owner's Title Insurance	\$573.00
C. Services Borrower Can Shop For	\$2,156.50	I. TOTAL OTHER COSTS (E+F+G+H)	\$1,755.30
Title - Closing Protection Letter	\$50.00	J. TOTAL CLOSING COSTS	\$7,002.29
Title - Closing/Settlement/Attorney Fee	\$580.00	D + I	\$7,002.29
Title - Doc Processing Fee	\$160.00	Lender Credits	\$0.00
Title - Lender Title Insurance	\$1,079.00		
Title - Loan Tie in Fee	\$87.50		
Title - Title Endorsement	\$200.00		
D. Total Loan Costs (A+B+C)	\$5,246.99		
		Calculating Cash to Close	
		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

[Go to table of contents](#)

Broker Portal: Caliber LE, cont.

Step

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

Menu AllRegs Contact Us Begin Live Chat Search for loan numbers

Loan Number 9791075246 Primary Borrower Firstimer, Alice Lock Status Expires 11/09/2020 Loan Stage Created 266

1003 Getting Started Prorations & Adjustments Preview LE Additional Caliber Disclosures

Product & Pricing View / Edit Lock Disclosure Clear Choice AUS Submit to UW Appraisal Docs & Conditions CD Collaboration

Do you want to include Mortgage Broker Fee/Compensation Agreement in the Caliber LE Package? *

Yes No

Do you want to include Anti-Steering disclosure in the Caliber LE Package? *

Yes No

By selecting yes, I acknowledge that it is my responsibility to ensure that, when required, the information is updated to accurately represent the options available to the borrower as required by Regulation Z.

Category	Interest Rate	Origination Charges Minus Lender Credit
Lowest Interest Rate	0 %	\$ 0
Lowest Interest Rate & No Risky Features	0 %	\$ 0
Lowest Total Origination Points & Fees	0 %	\$ 0
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.
 - Click **Upload**.

Menu AllRegs Contact Us Begin Live Chat Search for loan numbers DMJ

Loan Number 9725940465 Primary Borrower Firstimer, Alice Lock Status Unlocked Loan Stage Created 243

1003 Getting Started Preview LE Additional Caliber Disclosures Additional Broker Disclosures

Product & Pricing Lock Loan Disclosure Clear Choice AUS Submit to UW Appraisal Docs & Conditions CD Collaboration

Be sure to review and/or add DocuSign fields to your uploaded documents

Optionally upload additional broker disclosures.

Drag & Drop Files Here Supported file types: PDF, TIF, TIFF, PNG, JPG, JPEG

Browse...

Test Documents.pdf

Upload

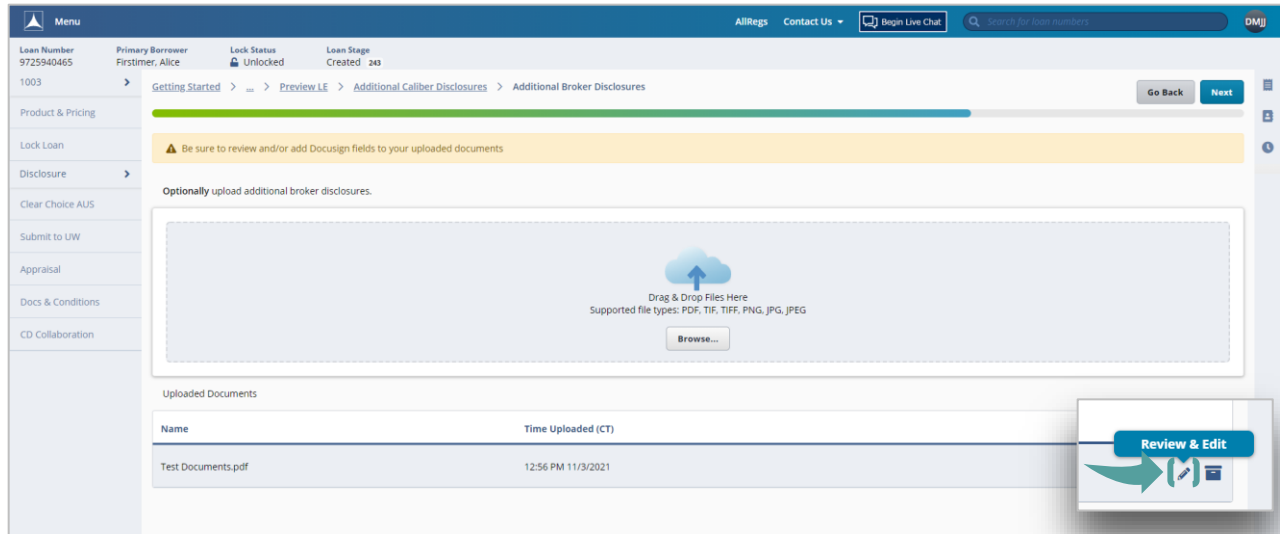
Name	Time Uploaded (CT)
No Documents have been uploaded yet.	

[Go to table of contents](#)

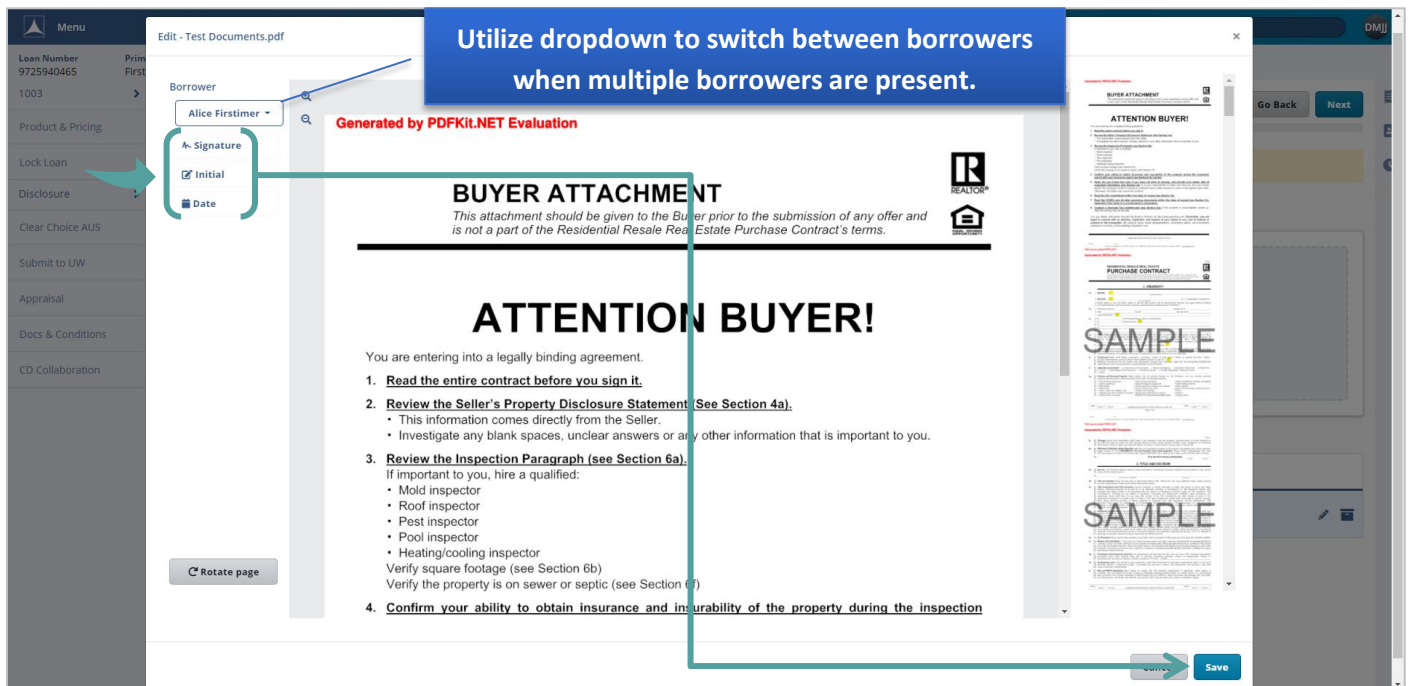
Broker Portal: Caliber LE, cont.

Step

- 10** Edit uploaded document (optional) ▪ Click  to Review & Edit the document.



- 11** Add DocuSign signature fields and click Save (optional) ▪ Click Save.

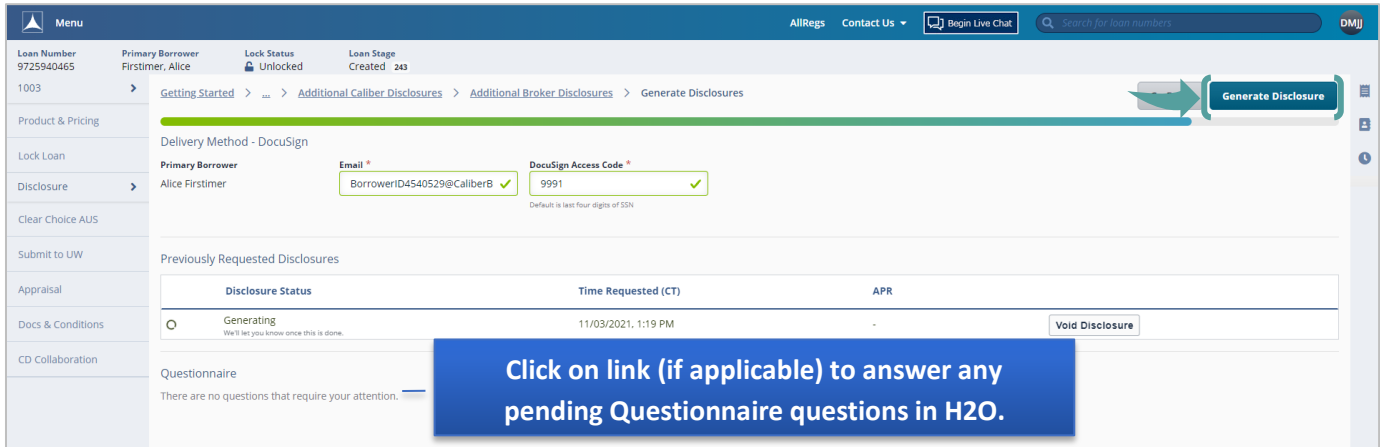


[Go to table of contents](#)

Broker Portal: Caliber LE, cont.

Step

- 12 Generate Disclosures** ■ Click **Generate Disclosure**.



Menu

Loan Number: 9725940465 | Primary Borrower: Firstimer, Alice | Lock Status: Unlocked | Loan Stage: Created 243

Getting Started > ... > Additional Caliber Disclosures > Additional Broker Disclosures > Generate Disclosures

Product & Pricing

Lock Loan

Disclosure

Clear Choice AUS

Submit to LW

Appraisal

Docs & Conditions

CD Collaboration

Delivery Method - DocuSign

Primary Borrower: Alice Firstimer

Email *: BorrowerID4540529@CaliberB ✓

DocuSign Access Code *: 9991 ✓

Default is last four digits of SSN

Previously Requested Disclosures

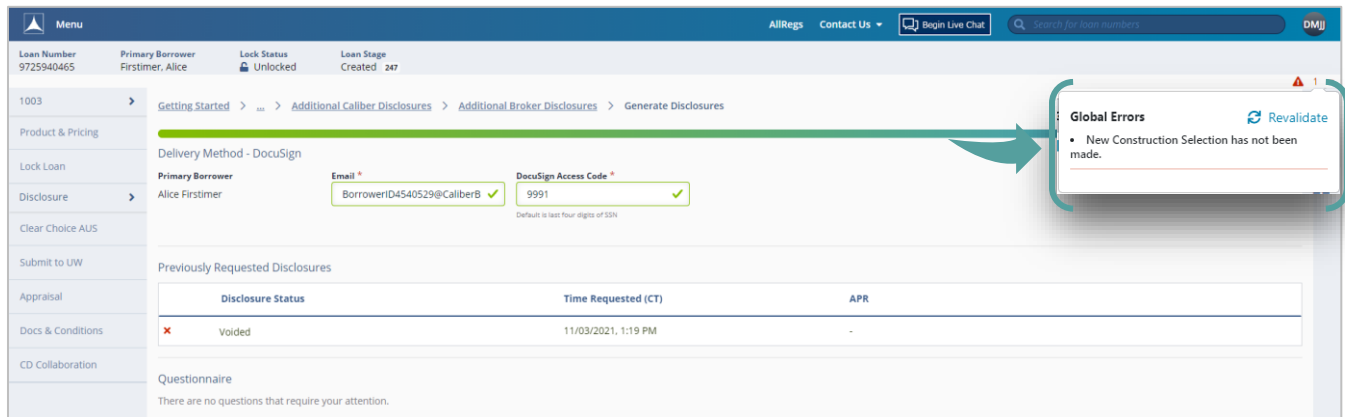
Disclosure Status	Time Requested (CT)	APR
Generating <small>We'll let you know once this is done.</small>	11/03/2021, 1:19 PM	-

Questionnaire

There are no questions that require your attention.

Click on link (if applicable) to answer any pending Questionnaire questions in H2O.

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



Menu

Loan Number: 9725940465 | Primary Borrower: Firstimer, Alice | Lock Status: Unlocked | Loan Stage: Created 247

Getting Started > ... > Additional Caliber Disclosures > Additional Broker Disclosures > Generate Disclosures

Product & Pricing

Lock Loan

Disclosure

Clear Choice AUS

Submit to LW

Appraisal

Docs & Conditions

CD Collaboration

Delivery Method - DocuSign

Primary Borrower: Alice Firstimer

Email *: BorrowerID4540529@CaliberB ✓

DocuSign Access Code *: 9991 ✓

Default is last four digits of SSN

Previously Requested Disclosures

Disclosure Status	Time Requested (CT)	APR
Voided	11/03/2021, 1:19 PM	-

Questionnaire

There are no questions that require your attention.

Global Errors [Revalidate](#)

- New Construction Selection has not been made.

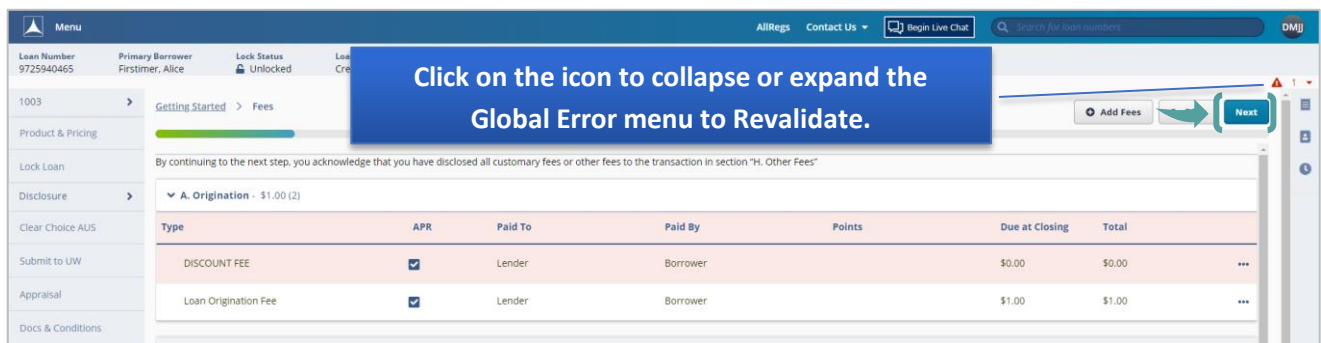
[Go to table of contents](#)

Broker Portal: Caliber LE, cont.

Step

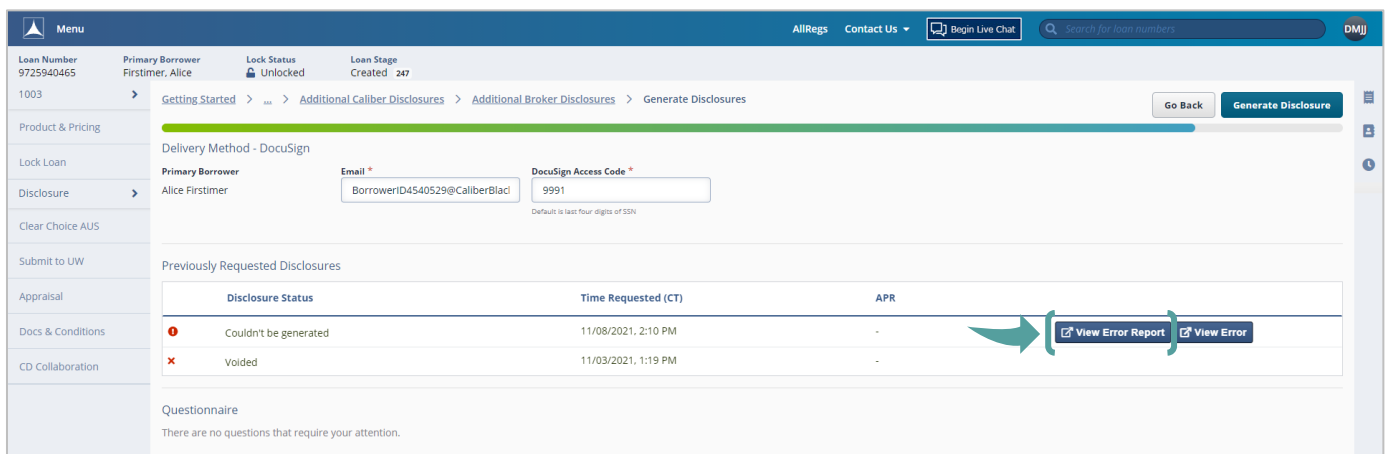
14 Save and Revalidate (if applicable)

- In H2O, click **Save** and then **Revalidate** within Global Errors to clear DV errors.
- In Caliber LE, click **Next** to save and then **Revalidate** within Global Errors to clear DV errors.



15 View Error Report (if applicable)

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

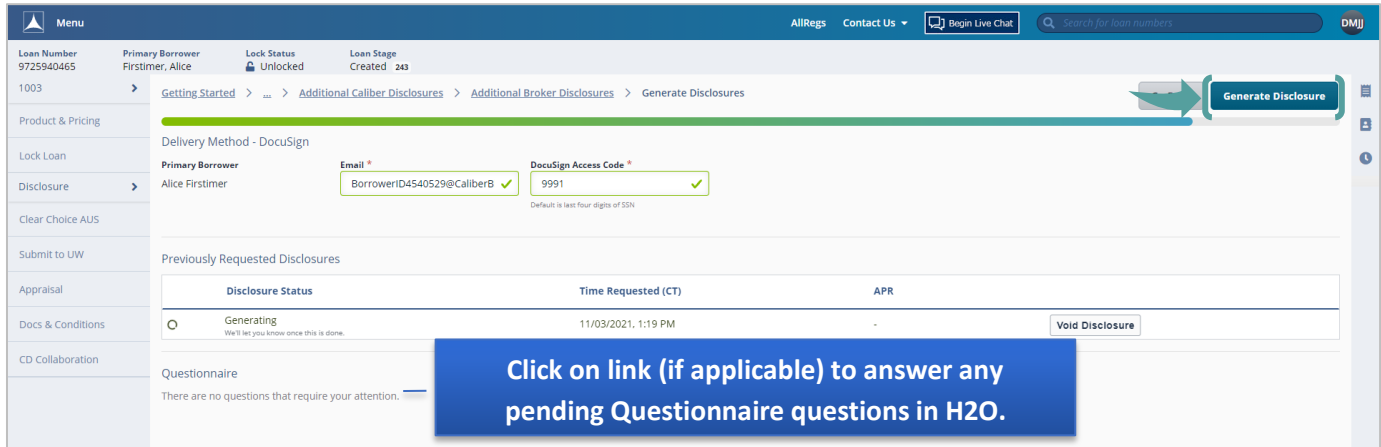


[Go to table of contents](#)

Broker Portal: Caliber LE, cont.

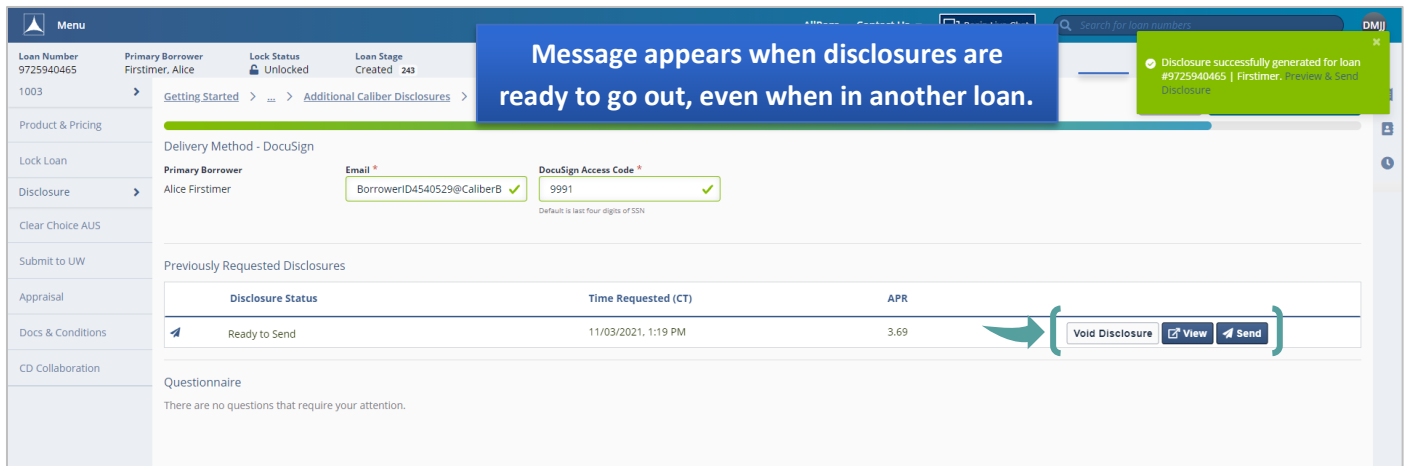
Step

- 16 **Generate Disclosures**
 - Click **Generate Disclosure**.



Click on link (if applicable) to answer any pending Questionnaire questions in H2O.

- 17 **View and Send Disclosures**
 - Option to Void Disclosure, View, and Send are available.



Message appears when disclosures are ready to go out, even when in another loan.

Disclosure successfully generated for loan #9725940465 | Firsttimer: review & send disclosure

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