

TRACKING & ORGANIZING YOUR LOAN DATA

1 SORTABLE LOAN LIST

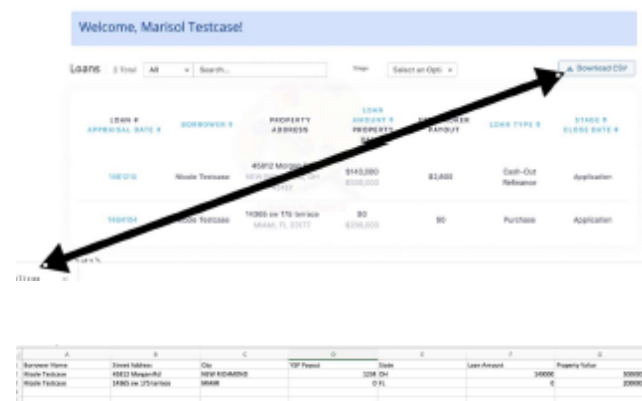
- Presented here is a list of your brokered loans.
- This list is fully sortable and filterable.

Column headers in blue are sortable

LOAN #	APPROVAL DATE	BORROWER #	PROPERTY ADDRESS	LOAN AMOUNT #	PROPERTY VALUE	EST. BROKER PAYOUT	LOAN TYPE #	STAGE #	CLOSE DATE #
1461210		Nicole Testcase	45812 Morgan Rd NEW RICHMOND, OH 45157	\$140,000	\$500,000	\$2,800	Cash-Out Refinance	Application	
1461204		Nicole Testcase	10000 SW 17th Avenue MIAMI, FL 33157	\$0	\$200,000	\$0	Purchase	Application	

2 DOWNLOAD THE LIST

- You can download this list, in a CSV form.
- Once downloaded click on the download and it will open in excel form.



3 DRILL DOWN TO LOAN DETAILS

- Click on the loan number for more details on each loan.
- The loan # is an internal tracking index that Visio uses to identify your loan.

Loan numbers are clickable, and drill-down to loan details

4 LOAN DETAILS

- Clicking on the loan # will bring you to a Loan Detail Page.
- This page includes all key loan information, documents for the loan, and loan status.

#1461210

45812 Morgan Rd
NEW RICHMOND, OH 45157
House

Borrower: Nicole Testcase (509)

Loan Stage: Application
Created Date: Mar 1, 2019
Close Date: Nov 24, 2021

Loan Type: Cash-Out Refinance
Property Value: \$500,000.00
Loan Amount: \$140,000.00
LTV: 28%
Interest Rate: 4.65%
Origination Fee: \$3,400.00

Documents List:

- VFS Loan Application (Upload Complete)
- Eth Document (Upload Complete)
- Asset Statement (Upload Complete)
- Flood Insurance (Status)
- Voided Check (Upload Complete)
- Formation Document (Upload Complete)
- Hazard Insurance (Upload Complete)
- Receipt (Upload Complete)

5 LOAN FIELDS

- Look to the right for an explanation of the loan fields.
- Stay tuned for more updates.

#1461210 - Loan Number, Visio assigned for tracking

45812 Morgan Rd
NEW RICHMOND, OH 45157 - Property Address
House

Borrower: Nicole Testcase (509) - Borrower Name (Credit Score) Email

Loan Stage: Application - Visio stage for loan

Created Date: Mar 1, 2019 - Date loan started

Close Date: Nov 24, 2021

Loan Type: Cash-Out Refinance - Purchase, Rate & Term Refinance, & Cash-Out Refinance

Property Value: \$500,000.00 - Property or Lending Value

Loan Amount: \$140,000.00 - Loan Amount

LTV: 28% - Loan to Value Ratio (Loan Amount/Property Value as a %)

Interest Rate: 4.65% - Loan Interest Rate

Origination Fee: \$3,400.00 - Fee applied by Lender on entering an agreement to cover the cost of processing loan

Visio Account Executive: No Reply - Should be contact info for AE, Processor, and Closer

Visio Loan Processor: no-reply@visiolending.com

Visio Loan Closer: [Redacted]