

The Windsor Full Service Process



MORE DIVERSE = MORE PROFIT

- Lending available across the U.S.
- Customized pricing model & rates to fit your institution and market
- Access to more products (VA, Jumbo, Bond State Housing programs)
- Close on-time

ONGOING TRAINING TO HELP ACHIEVE YOUR GOALS

- Sales & Product Training – Beginner, Advanced and Intermediate Levels
- Boot Camp – On-site or off-site (1.0, 2.0, 3.0 courses)
- Acquire Help to Build Realtor Relationships
- Theme Days – M-F with Loan Officers and Loan Partners
- The Process – Customer Experience
- Tailor-made coaching plan
- Lunch & Learns
- FHLB Grants
- Site Visits

MITIGATE RISK

- Good relationship with investors to help stay abreast of changes to underwriting guidelines and market changes

ELIMINATE COSTS

- Processors, underwriters, and compliance included
- \$0 Fee per loan
- Solution Specialist – deal set-up, select products, find alternative to get deals done
- Access to industry leading mortgage software – Mortgage Application Program
- Decades of home financing experience
- Custom reporting
- Provides tools for a better customer experience
- No junk fees for processing, underwriting, transferring, etc.

COMMUNICATION

- Pipeline updates to senior management
- Loan process updates to bankers on each loan
- Dedicated loan partner assigned to your institution from day one to handle all loans
- More flexible: smaller company = more personal relationships with originators

PRODUCTS & PROCESS

- Pre-Audit and Post Audit
- Fannie and Freddie
- Ginnie Mae
- E-sign Documents
- Experience doing retail loans – we know what a LO goes through every day
- Offers peace of mind that Windsor finds every possible solution to approve each customer



All loans subject to approval. Windsor Mortgage is a service provided by Plains Commerce Bank. NMLS# 463950