

Fw: Mortgage Support

JH

Josh Heinrich

To: Josh Heinrich



Sun 7/24/2022 4:10 PM

Items Mortgage Support WILL help with:

- Income calculations for Net rental income, and SAM worksheets for S/E borrowers.
- Guideline/scenario research
- FHLB grant submission/disbursements
- IBTS orders
- Surefire Administration
- Vendor Additions
- VA entitlement worksheets
- Sending out Sharepoint Training materials - All former Eloomi Trainings are available.

Items Mortgage Support WILL NOT help with moving Forward:

- Income calculations on W2 Wage Earners - Please see your sales manager when necessary.

- Prequal Request Reviews - Please see your sales manager when necessary.

- AUS and GUS Submissions / Prequal Advice

Note- We have created a branch manager distribution called bulletin@flanaganstatebank.com

This bulletin board distribution is designed for branch managers to ask each other any AUS/prequal question for feedback

If an LO is having difficulty with an AUS/prequal, their branch manager can ask their peers for help.

The sales managers (Josh, Doug, and Justin) are also on the bulletin board for us to see items that may need to be addressed within our technology/process moving forward.

*Note - Branch Managers, if you want removed from the bulletin@flanaganstatebank.com simply email IThelpdesk@flanaganstatebank.com and ask them to kindly remove you from the distribution!

- VA COE Support

If you want to order a COE during a prequal stage, we have created a new distribution called

COE@flanaganstatebank.com

Please send these requests to this distribution in the future.

- MBOT Support

In the future if you are having issues with Mortgage-BOT or need personnel access help, please email MBOT@flanaganstatebank.com.

- Marketing Requests

As mentioned prior. We will be coming out with streamlined marketing request procedures by the end of the first week of August. The new process will involve our marketing department directly and the process will be streamlined.

If you have further questions, please contact your sales manager.

Thank you. Have a great weekend!

Josh Heinrich / NMLS ID: 334476

Retail Sales Manager