
From: Toni Pierce
Sent: Friday, April 29, 2022 9:00 AM
To: Sales; Mortgage Support Center; Mortgage Support Center
Cc: Dave Weber; Josh Heinrich; Justin Yahnig; Rebecca Moorehead; Robert Anderson; Toni Pierce; Wayne Pierce
Subject: Surefire Updates

Follow Up Flag: Follow up
Flag Status: Flagged

Good morning, everyone! Happy Friday! I have a few important updates for Surefire following our last two training sessions this week.

Automatic Status Update Emails

These have been updated and timing re-arranged to better fit our workflow. You will not see the bars in your deal section turn purple for the LE, Documentation and Appraisal status but the emails will be sent out automatically. As will the Rate Lock email.

Here is the timing of this:

Application Email will go out immediately when it hits the Surefire system.

2 hours later the Rate Lock email will be sent out. (just informs them it might be wise to lock and why)

1 day later the LE email is sent out

2 days later the Documentation email is sent out

The rest of the emails (except appraisal) will be triggered by the report system that is uploaded daily. The appraisal email will be sent out 1 day after the processing trigger is received by Surefire.

The great news is that LO's do not need to worry about the emails as the system will send them automatically.

As long as your Real Estate Agents and Co-borrowers are attached to the deal, all parties will get these emails!

Launch Date

I am moving this date to Wednesday, May 4th....I want to review deals/pipelines again to make sure all are cleaned up before we go live. I will confirm this date before we flip the switch! Please get your deals cleaned up before launch so we can look great to our customers!

Questions about Surefire? Let me know!

The opinions contained herein are based on a proposed loan scenario presented to us by you. They are non-binding, intended to be informational only, and under no circumstances are to be construed as a commitment to purchase the loan. The Seller/Loan Officer is responsible for the information provided to Mortgage Support/Assisted Correspondent or Scenarios to insure we have the most/best information to provide an accurate response for the situation being discussed. Delegated customers are responsible for making their own credit decision with respect to the loan. All loans submitted to Flanagan State Bank are subject to the terms and conditions of the matrix's published on our website and the Agency guidelines that apply to the loan type.

Toni Pierce

TPO National Sales Manager/Account Executive
Mortgage Support/Assisted Corr Department Manager
NMLS 329142

www.fsbtpo.com

Flanagan State Bank NMLS 408461
815-676-0988 Direct Office

815-761-2442 Cell

