Mortgage:

Please manage your own email with template and poster pages together when sending out the emails.

1. Always fill an application from<https://www.loan-acc.net/home-mortgage-inquiries>
2. The Processing Team will inform you/your manager how much approximately the client can get. Discuss the **pre-approved amount** with the client.
3. Billing team will send out the Retainer & fee agreement to the Funding Specialist and the Client. **Client and Specialist both sign** retainer and fee agreement, collect check.
4. Collect “document checklist” from the client.
5. Get the **check** for retainer*;*
6. File your client in your Google Drive and name the file by their **name; share with your manager email & processing@loan-acc.net**
7. Billing team will send out the Retainer & fee agreement to the Funding Specialist and the Client.
8. Loan processor will process the loan
9. **Close** the deal
10. Funded.
11. Put your exact funded amount on your pipeline. Calculator your commission, send to the billing@loan-acc.net.
12. Get paid.

Our IT department is creating the internal portal for letting all departments on the same page.

<https://www.loan-acc.net/internal-portal>

Will be much easier for each department to do their job in processing.