



# A SMARTER WAY TO GROW



# ONBOARDING AND IMPLEMENTATION PROCESS

Send us your loan documents and we do the rest.

This is the beginning of a relationship, so it's important you have a team of knowledgeable resources to help coordinate the onboarding and implementation process.

"The implementation process was very smooth. The LoanBoss team worked seamlessly with our team to onboard our portfolio and ensure the data was accurate."

– John Majeski, The Donaldson Group

## IN-HOUSE SUPPORT NETWORK

There is a whole team dedicated to getting you onboard so you can stay focused on your day-to-day activities. The LoanBoss in-house team will do all the heavy lifting for your company.



Abstract Team



Onboarding Coordinator



Validation Team



Quality Assurance Team



Training Team and Ongoing Support

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"We've found LoanBoss to be an invaluable part of managing our portfolio and adjusting strategies in such a dynamic environment. There are very few vendors that feel like partners, but I can honestly say that the LoanBoss team treats our business like their own."

**Brock Wright**  
The Connor Group

# WHAT IS REQUIRED FROM YOU?

We will do the heavy lifting, but we will need some help from you to get started.

## ORGANIZE

We start by simply listing out all your deals into an Excel spreadsheet.

### We will also do things like:

- Create user logins
- Assign team members to deals for our monthly check up
- Choose groupings

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"We are constantly searching for ways that technology can give us a competitive advantage. LoanBoss was a perfect fit."

**Tom Briney,**  
Origin Investments

## UPLOADING DOCUMENTS

We will provide a secure link for you to easily upload documents. These typically fall into two buckets.

### FINANCING DOCS

- Note
- Loan Agreement
- Guarantees
- Closing Statement
- Cash Management Agreements
- Hedge Documentation

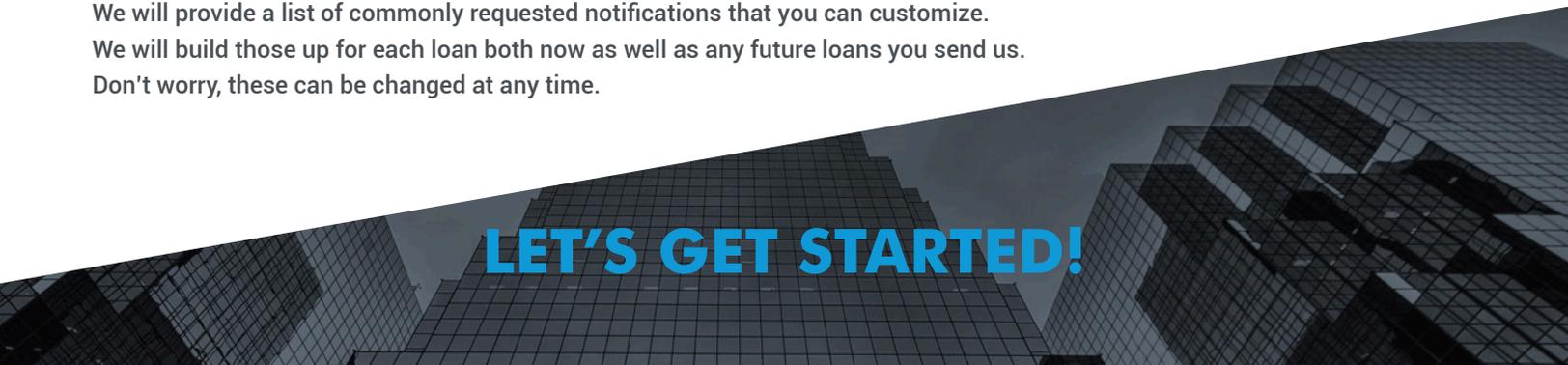
### PROPERTY DATA

- Property Value and as of date
- Appraised Value and as of date
- Occupancy
- NOI (Lender)
- NOI (Actual)
- Projections

We typically start with the loan documents and gather the most up-to-date property data at the conclusion of implementation. But if you want to get a head start, please do!

## NOTIFICATIONS

We will provide a list of commonly requested notifications that you can customize. We will build those up for each loan both now as well as any future loans you send us. Don't worry, these can be changed at any time.

A stylized, dark-toned illustration of a city skyline with several skyscrapers, serving as a background for the bottom section of the page.

**LET'S GET STARTED!**



Ready to modernize the way you do business?  
Talk to the Boss.

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