



# 14.5 Days to Close

(Day 1 begins when Execution of Contract / All Docs are submitted)

## Day 1 SHORT FORM

- Borrower comes in via a short intake form. All information will be pushed to Hubspot.
- Loan Officers will have their separate external short forms embedded in their own Page.



## HUBSPOT Day 1



- Borrower comes in via a short intake form.
- All information will be pushed to Hubspot.
- Loan Officers will have their separate external short forms embedded in their own Page.

## Day 1 ARIVE (LOS)

All information from Arive will be pushed to HubSpot.

- Run Credit, Import Numbers, Run Pricing, Run AUS
- Export 3.4 file to push into Investor's Portal

In order to price and/or disclose



## REVIEW WITH UNDERWRITER

Day 1



- Submission Approval [Deal Review] will be reviewed with underwriter ping her in the "TAG TEAM" channel
- Select "Submission Review" in the Deal Review property

## Day 1 SEND EMAIL

Send HANDOFF EMAIL TEMPLATE to:

- Buyers Agent, Buyers Transaction Coordinator, the Lead, sales@taglendinggroup.com, ops@taglendinggroup.com
- cc: ops@winnerschoiceprocessing.net

This means that the client is setting up a meeting with the Processor.



# SALES CYCLE



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## DAY 2

- Makes sure all fields in Hubspot are reviewed.
- Makes an introductory call to all associated contact of that deal.
- Reviews every milestone/property in Hubspot and scrub initial files. If any document is missing, Processor will take it from the borrower and do Initial Automation.



## DAYS 3 - 4

- Order Appraisal / Services, Insurance quote
- Update HubSpot
- Submit to Underwriting
- Move milestone



## DAYS 5 - 7

CONDITIONALLY APPROVED:

- Send the Final Conditional Approval template and make sure to call/text the borrower to set a meeting to review conditions. (All conditions must be in the contact sidebar)



## DAYS 8 - 10

- Submits for final CTC



## DAYS 11 - 13

- Once CTC-ed, the processor reviews the final CD with the Borrower
- The Processor fills out Post Closing Revenue Checklist.



## DAY 14

FUNDED!

# OPERATIONS CYCLE