

TYPE OF MORTGAGE LOANS

TRADITIONAL LOAN OPTIONS

- Conventional Loan (LTV 3%, 5%, 10%, 20%)
- FHA Loan
- VA Loan (Waiving Escrows)
- USDA Loan
- Jumbo Loan
- Reverse Mortgage
- Home Equity Line of Credit (HELOC)
- Refinance Loan
- 1% Giveback Program *

DIVERSIFIED LOAN OPTIONS

As a correspondent lender, our extensive network of investors enables us to offer our clients a wide array of loan options, ensuring they have access to a diverse range of financing solutions.

NON-QUALIFIED MORTGAGE

- Bank Statement Loan
- Investor Loan (DSCR: Primary/Investment)
- Foreign National Loan
- Stated Income Loan (Fix and Flip)
- No Income/Ratio Loan
- Hard Money Loan
- Commercial Loan
- Bridge Loan (Foreign Nation)
- Private Lending

CONDO REVIEW

Check our step-by-step guide to secure financing for a condo.



MAXIMIZE Your Reach

BOOST CLIENT RETENTION



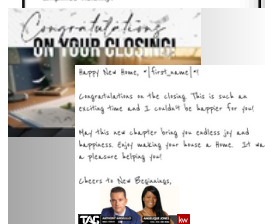
- **Relevance:** Personalized QR code mailers connect with recipients in specific areas.
- **Local Expertise:** Showcasing area knowledge through QR-linked resources builds trust with tailored market insights and instant information access.
- **Budget Efficiency:** Focusing QR code mailers on potential leads in targeted areas.
- **Actionable Personalization:** QR codes linked to local offers or events.

TAILORED CELEBRATION CARD: PERFECT FOR ANY OCCASION

- **Personalized Greetings:** Tailored messages create a genuine connection for any holiday or occasion.
- **Relevant Offers:** Specialized promotions boost engagement and conversions.
- **Memorable Design:** Creative themes leave a lasting impression, enhancing the holiday or occasion experience.

3-YEAR POST CLOSING CAMPAIGN

- **Partnership Enhancement:** Co-branded 3-year post-closing mailers strengthen realtor and loan officer collaborations for sustained client support.
- **Long-Term Engagement:** These mailers nurture lasting relationships by delivering valuable updates and resources over 3 years, benefiting clients and professionals alike. (We add gifts such as: gift cards, movie tickets, dinner, wine, baskets, chocolates, cutting boards, wine glasses etc.)
- **Elevated Brand Presence:** Collaborative branding amplifies visibility.



CUSTOMIZE YOUR OWN OPEN HOUSE FLYER

SCAN
ME



Transforming Real Estate Horizons: Tag Lending Group and Homebot
"Your Key to Informed Financial Moves!"

lending.tagteamnation.com/client-retention



Experience a structured digital journey with Tag Lending Group, guided by our proprietary Roadmap to Home Ownership, to address your financial requirements.

Our Artificial Intelligence platform offers clear guidance, while our licensed Mortgage Loan Originators provide hands-on support throughout the entire process.

EMPOWERING HOMEOWNERSHIP THROUGH AI

Our mission at Tag Lending Group is to provide customers with a quality and affordable financial solution using our AI Mortgage Solutions Roadmap to Homeownership ®. Furthermore, with our technology systems and competitive rates, we are advancing in the industry.

TAG LENDING GROUP

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Why Choose Us?

- Wholesale Mortgage Company
- Proprietary AI Mortgage Solutions Roadmap to Homeownership will give the Realtor/Borrower a comprehensive Homebuyer analysis.
- Our Artificial Intelligence system provides you with direction and clarity while our licensed Mortgage Loan Originators hold your hand throughout the process.
- Very Competitive Interest Rates
- No Junk Fees
- Same-Day, Approval Process
- 14 Day Close
- Several Investors/Banks to correspond with giving you multiple loan options.
- Let's TAG TEAM™ This Deal

YEAR-TO-DATE: STATISTICS

Approval Turn Time: Same Day | 36 hours

Average Underwriting Touches: 2.19

Lock Pull-Through Percentage: 74.07%

Submission-to-Close Percentage: 80%

Average Days Submission to CTC: 12.62 Days

Appraisal Timing: 5.3 Days

OUR SERVICES

SHORT FORMS

Our form acts as a liaison/script with the ability to score and convert your borrowers faster through co-branded target marketing.



ENGLISH



SPANISH

JOIN OUR TEAM

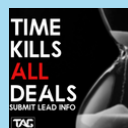


TALK TO US ABOUT OUR 14-DAYS TO CLOSE!

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

SALES

DAY 1



SHORT FORM

Borrower comes in via short intake form. All information will be pushed to HubSpot.

HUBSPOT



- Documents are collected.
- Automation notifies ALL parties (E.T.C.V = Email, Text, Call, Video)



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

CYCLE

DAY 1-2



LOAN OFFICER ASSISTANT

Compiling essential documentation and organizing files for Loan Officers.



REVIEW WITH UNDERWRITER

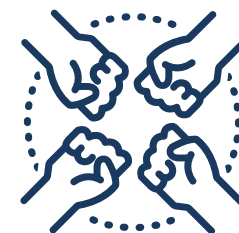
Submission Approval [Deal Review] will be reviewed with underwriter.



SEND LOAN PROGRAMS TO CLIENT

Introduction to Winner's Choice Processing

"LET'S TAG TEAM A 14 DAY CLOSE!"



OPERATIONS



PROCESSOR

DAY 2-3

- Makes introductory call to all Parties (point of contact).
- Reviews every milestone / property in HubSpot and scrubs initial file.
- Collects all missing documentation needed.

DAY 3-4

- Order Appraisal / Services
- Insurance Quote
- Submit to Underwriting
- Automation will update Borrower and all parties pertaining each milestone

CYCLE

DAYS 5-7:

Conditionally Approved:

- Sends Final Conditional Approval and calls all parties to set a meeting to review all conditions.

DAYS 8-10:

- Submits for final Clear-to-Close

DAYS 11-12:

- Once Clear-to-close and balanced with title company, the Processor reviews final Closing Disclosure Statement with all Borrowers

DAY 13/14 FUNDED!