

**Customer**

**Loan Production**

**Secondary Marketing**

**Real Estate Accounting**

**Servicing**

Loan Request

Origination:  
- Obtain loan and credit data from customer.

Loan Production:  
- Verify loan and credit information.

Loan Production:  
- Notify customer

Loan Closer:  
- Prepare necessary loan documentation.

Escrow:  
- Disburse loan funds according to escrow instructions, forward loan documentation

Quality Control:  
- Perform Quality Assurance review.

Loan Declined

Loan Approved

Payments/Inquiries

Marketing:  
- Monitor pipeline & warehouse inventories.

Underwriting:  
- Evaluate risk of borrower and property respective to underwriting guidelines

Loan Approved

Inventory Control:  
- Inventory loan documents, set-up on warehouse database.

Inventory Control:  
- Obtain Insurance on FHA/VA loans, follow up on outstanding documents.

Shipping:  
- Allocate Loans to Commitments review loans for compliance with investor requirements.

Trading:  
- Obtain commitments from investors.

Marketing:  
- Set-up commitments on marketing/pipeline management system.

Note, Funding Sheet received. Loan recorded on General Ledger.

Receive sale proceeds, record sale on General Ledger.

General Ledger reconciliation and interest accrual.

Commitment to purchase loans

New Loan Verification & Micrographics:  
- Loan set-up on servicing system, film documents.

Loan Sale

Customer Services:  
- Payment Processing  
- Tax/Insurance  
- Payoffs/ Assumptions

Investor Services:  
- Investor Reporting  
- Collections  
- Variable Rate Loan Servicing

Remittances/Reports

**Double-click here for tips on creating this drawing.**

Customer

Loan Production

Secondary Marketing

Double-click here to return to previous page.

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When your documents are too large for an 8.5 X 11 drawing page, resize the page to fit your document using Dynamic Page Sizing. Place the pointer on the edge of the drawing, hold the control key and mouse button down, then drag the page to the desired length. This function works horizontally and vertically.

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Click the line created with the Connector Tool and drag the line bend to the location you want.

The Connector Tool on the Standard toolbar now automatically routes around objects. This feature allows you to create detailed diagrams faster and easier.

The Connector Tool on the Standard toolbar now allows you to create line jumps. From the File menu, choose Page Setup, then click the Page Properties tab. There you can select the line jump style of your choice.

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