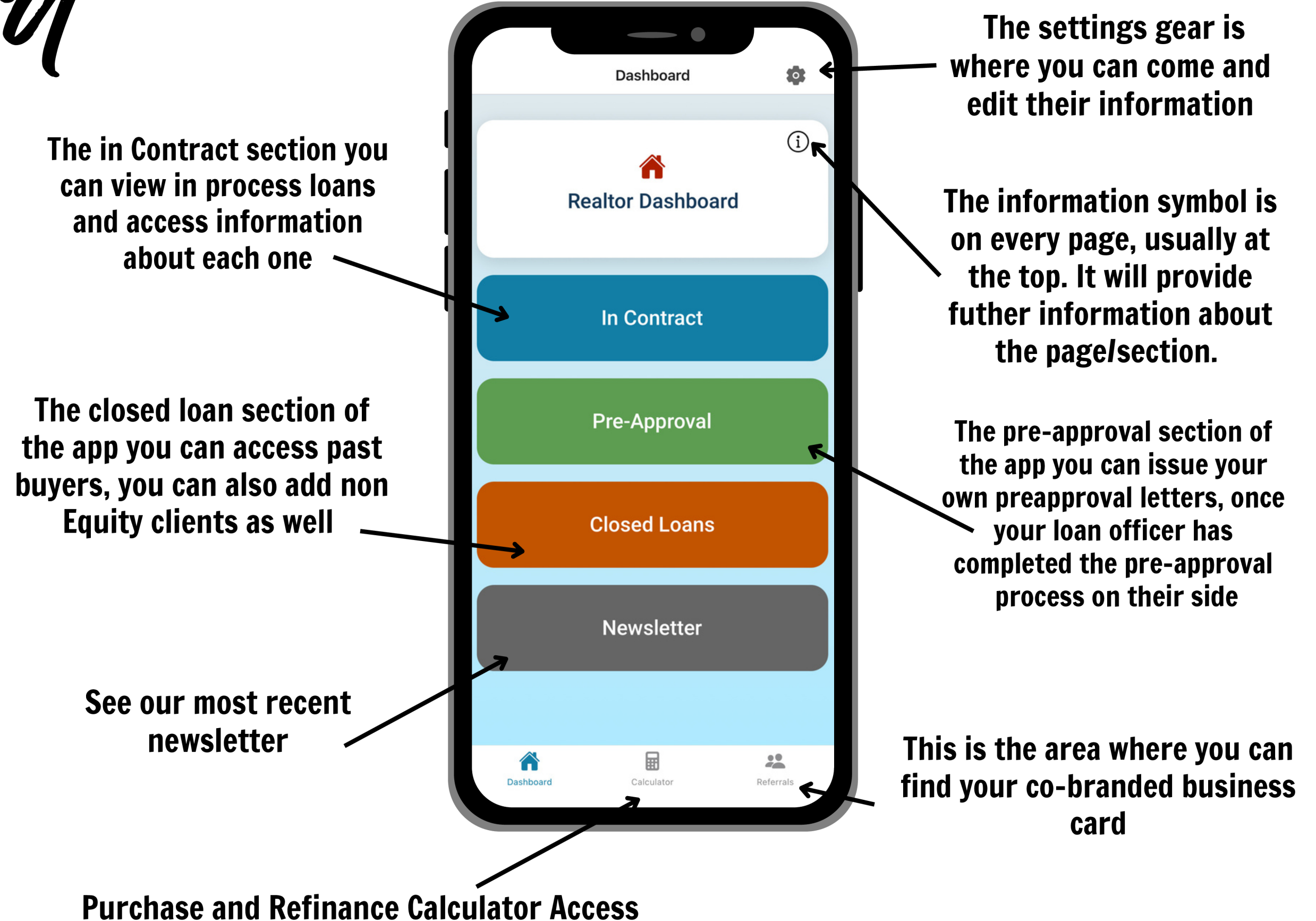




Realtor App  
*Walkthrough*

# Dashboard

**From the Dashboard you can navigate the app**



# Push Notifications

**Stay top of mind with push notifications for current and closed loans**



**Cleared to Close - You will receive an email when a client's loan has been marked "Clear to Close"**

**Home Purchase Anniversaries - On the 1st of every month, you will receive a notification to log in for a list of the months purchase anniversaries**

**Client Birthdays- On the 2nd of every month you will receive a notification to log in for a list of the month's client birthdays**

**Appraisal Updates - You will receive a notification when Appraisal Updates take place as well as when an appraisal is ordered, completed and received back**

# In Contract Loans

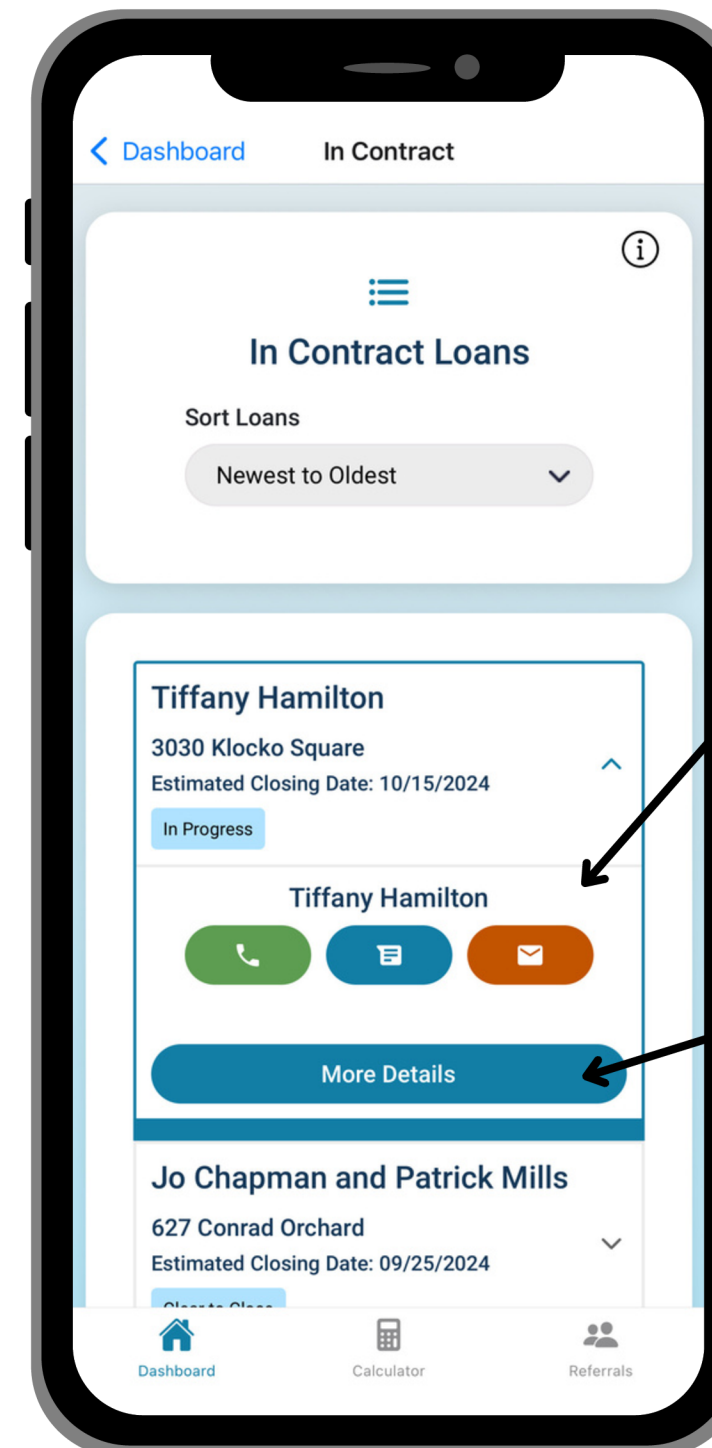
**You will also receive a notification when you get a New Loan or New Prequal when a client's loan has been added to E247**

**Each clients entry shows the borrower, the estimated closing date, and the current loan status**

**This section will list your loans with us that are in contract**

**We also provide contact buttons for your buyers so you can reach out easily**

**To view more information press "more details"**





# In Contract Loans

**In Loan Details you can see detailed status updates of the loan**

**Status shows the most current information from our processing team**

**Look here to find your clients Estimated Closing Date**



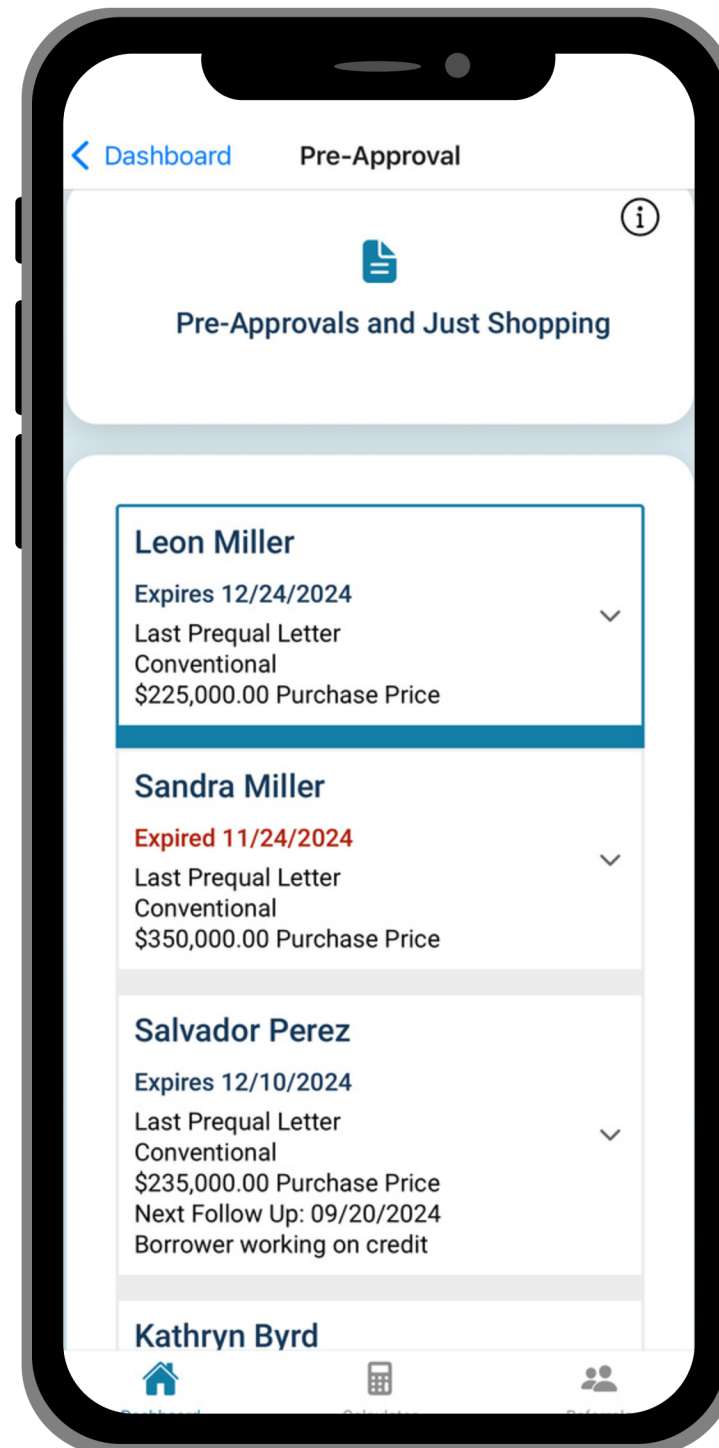
**Next Step gives a detailed description of what's coming**

**The appraisal section not only provides you written updates from our team, but also live appraisal dates directly from our provider**

**You can know the due date, or the date the appraisal is received as soon as we do**

# Pre-Approval

**In the Pre-Approvals you can see all the new clients who apply with Equity Resources**



**Use the list to keep track of each clients current status, set reminders for important dates and help keep in touch during the home shopping process**

**Contact information is also listed for each client in the list making it an easy address book of all your clients. Your LO can remove any contacts to ensure it stays relevant**

# Pre-Approval

## Need an updated approval letter?

Once you click on the client you can see the current max approval amount and adjust the purchase price to suit the offer you are writing

Choose amount for purchase price (under max)

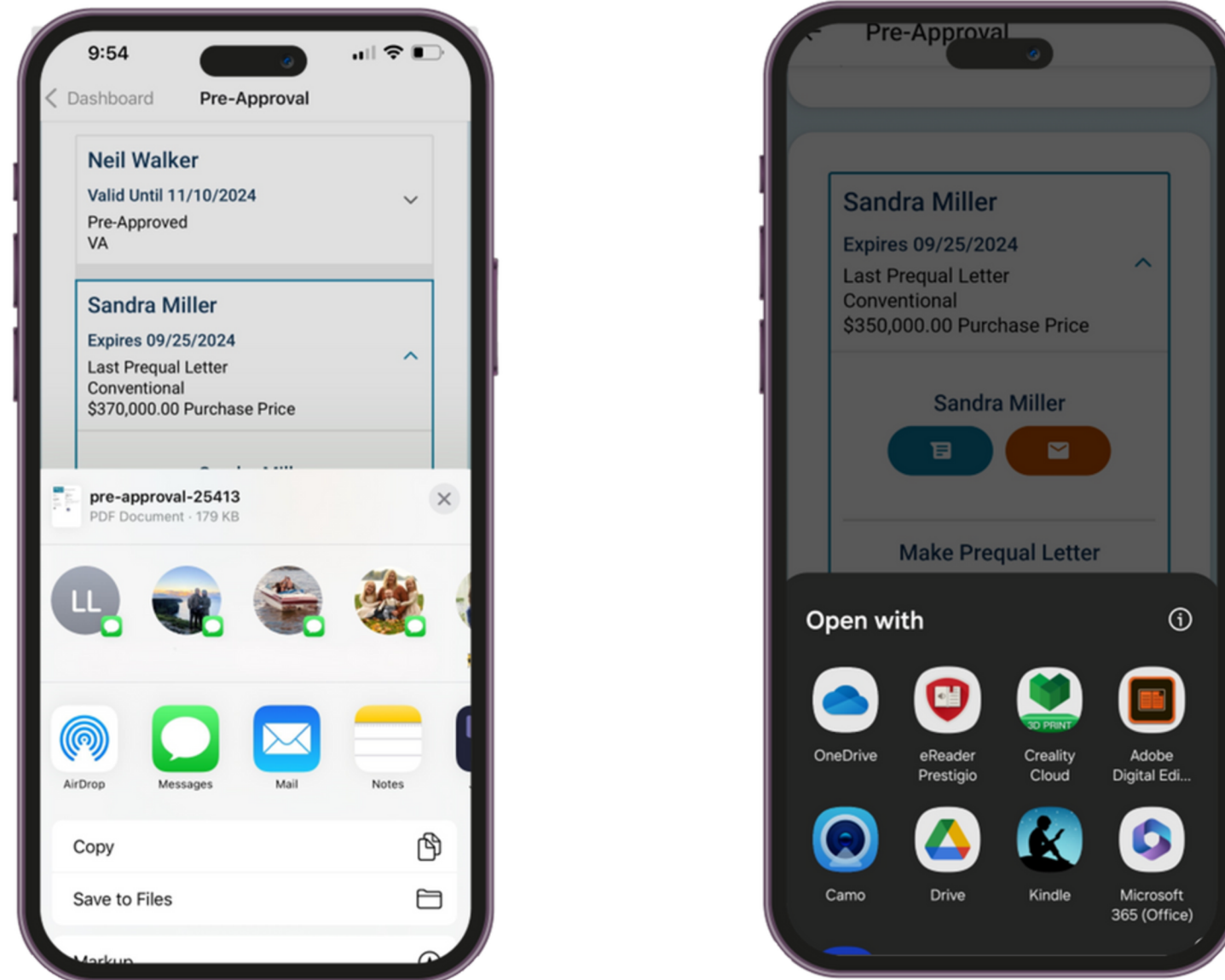
The screenshot shows the 'Pre-Approval' screen for a client named Leon Miller. At the top, there's a navigation bar with a back arrow and the text 'Dashboard Pre-Approval'. Below this is a header 'Pre-Approvals and Just Shopping'. The main content area displays the client's name 'Leon Miller', the expiration date 'Expires 12/24/2024', and the current pre-approval details: 'Last Prequal Letter Conventional \$225,000.00 Purchase Price'. Below this, there are two buttons: a blue one with a list icon and an orange one with an envelope icon. A section titled 'Leon Miller' contains a 'Make Prequal Letter' button with a '\$255,000 Max Price' label. Underneath, there are two dropdown menus: 'Loan Type' set to 'Conventional' and 'Purchase Price' set to '\$225,000'. At the bottom of the form is a large blue 'Download' button. The bottom navigation bar includes icons for 'Dashboard', 'Calculator', and 'Referrals'.

Once the chosen amount is updated, click the download button and save the new Pre-Approval letter

The image shows a sample of a Pre-Approval letter from Equity Resources, Inc. The letter is titled 'Pre-Approval' and includes the following information: Date: 11-26-2024, Pre-Approval For: Leon Miller, Loan Type: Conventional, Purchase Price: \$225,000.00, Property Address: TBD, and Real Estate Agent: Sarah Thiel. The letter also contains a disclaimer stating that the pre-approval is based on an application, credit report, and supporting documents, and is not a written loan commitment. The letter is signed by Ed Rizor, Owner/President, and includes a 30th Anniversary seal from 1994 to 2024.

# Pre-Approval

## Downloading your updated Pre-Approval letter Apple vs. Android:

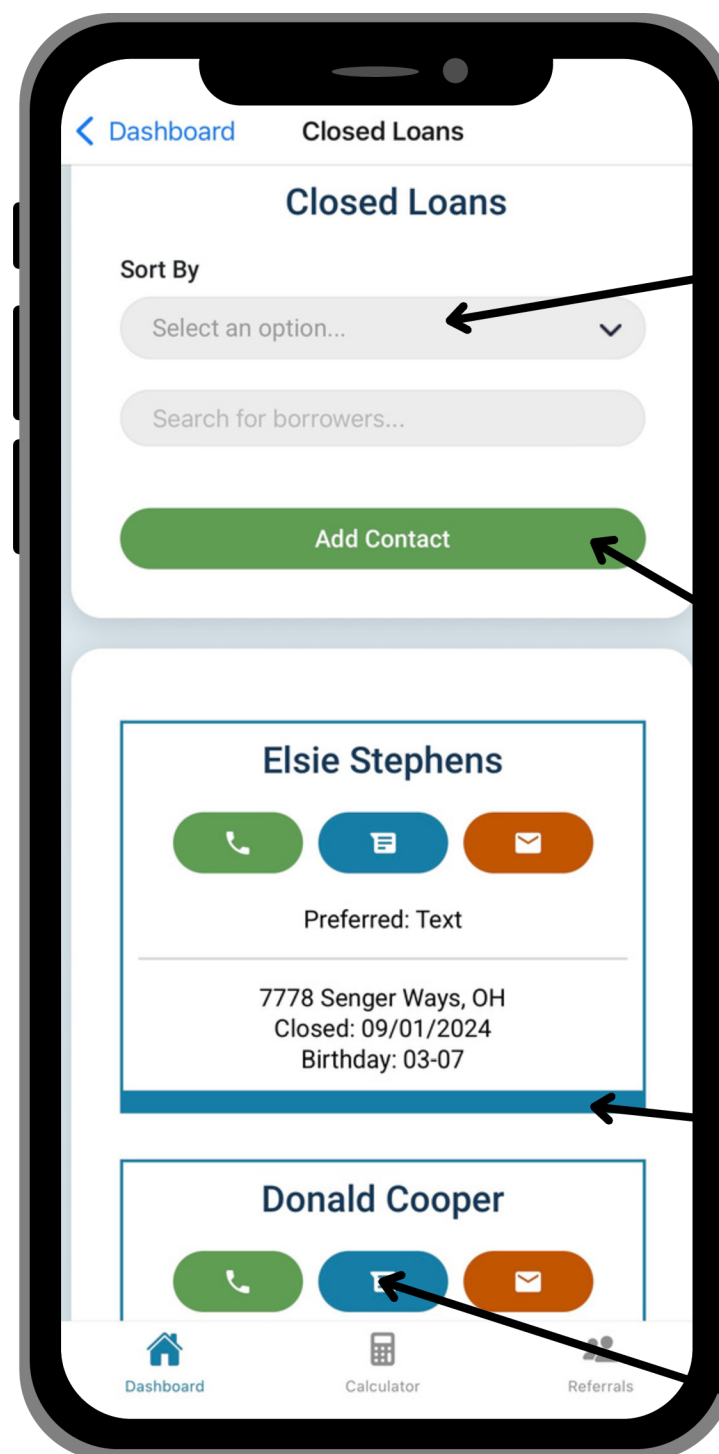


Once you have downloaded the letter save it to your files or send it immediately via text message or email



# Closed Loans

**Here a realtor can see  
their closed loans with us**



**Help keep up with past clients easily  
and navigate your list easily.**

**Sort Options:  
Closing Anniversary  
Last Name  
Most Recently Closed Loan  
Upcoming Birthday**

**You can use the app as your own  
client relations manager, by adding  
other active clients. The information  
is private and we cannot access it.**

**When a client is added by us it will  
show blue, when you add them they  
will show orange!**

**This is an easy way to keep  
in touch with clients, via text,  
a phone call or email**

# Newsletter

This is the newsletter that our marketing department puts together for Realtors

Speak to your L0 partner about getting your own cobranded letter that we send out 10 times a year!

Easily zoom in on page to read newsletter!



# Financing Calculator

This is where you can access our purchase and refinance calculators

The screenshot shows the 'Purchase' calculator interface. At the top, it displays an estimated monthly payment of \$4,216.14. Below this, there are two tabs: 'Purchase' (selected) and 'Refinance'. The 'Purchase' section includes input fields for Purchase Price (\$500,000), Loan Term (15 Years), Interest Rate (7.192 % APR), and Other Loan Details (Mortgage Insurance \$0, HOA Fee \$0, Property Taxes \$400). The 'Refinance' section includes input fields for Down Payment (\$100,000, 20 %), Loan Type (Conventional), and Interest Rate (7 % Fixed Rate). A disclaimer at the bottom states: 'Your actual rate, payment, and costs could be higher. Get an official Loan Estimate before choosing the loan. Rates are available as of today but are subject to change. This is not a credit decision or a commitment to lend. Loan program examples are for informational purposes only and are subject to change without notice. Other programs available. Certain restrictions apply, call for details. NMLS 1579. Equal Housing Lender.'

The screenshot shows the 'Refinance' calculator interface. At the top, it displays an estimated monthly payment of \$859.97 with a \$30.03 Monthly Savings. Below this, there are two tabs: 'Purchase' and 'Refinance' (selected). The 'Refinance' section includes a dropdown for 'What is your reason for refinancing?' (Lower My Monthly Payment), a field for 'Current Monthly Payment' (\$890), and an 'Update Current Loan' button. The 'Purchase' section includes input fields for New Loan Amount (\$104,625), Term (30 Years), Loan Type (Conventional), Interest Rate (6.94 % APR), and Other Loan Details (Mortgage Insurance \$0, HOA Fee \$0, Credit Score 779+). A black arrow points from the text 'There are information buttons available to help you along the way' to the 'Credit Score' dropdown menu.

Did you know that one of the most searched terms in the mortgages industry is a purchase calculator?

These calculators can help your client quickly and accurately predict their potential monthly mortgage payment with just a few pieces of information

Our in house calculators have daily updated rates. The purchase calculator offer the ability to look at different loan programs.

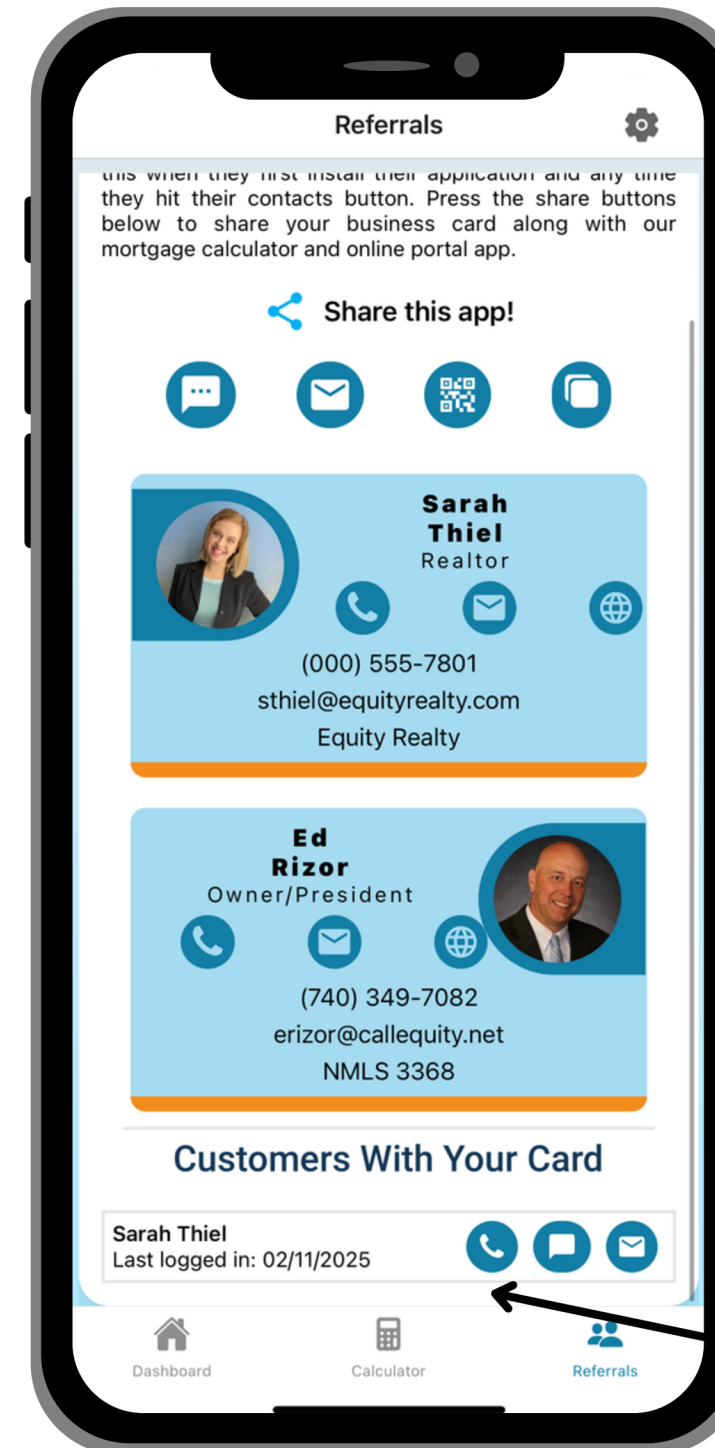
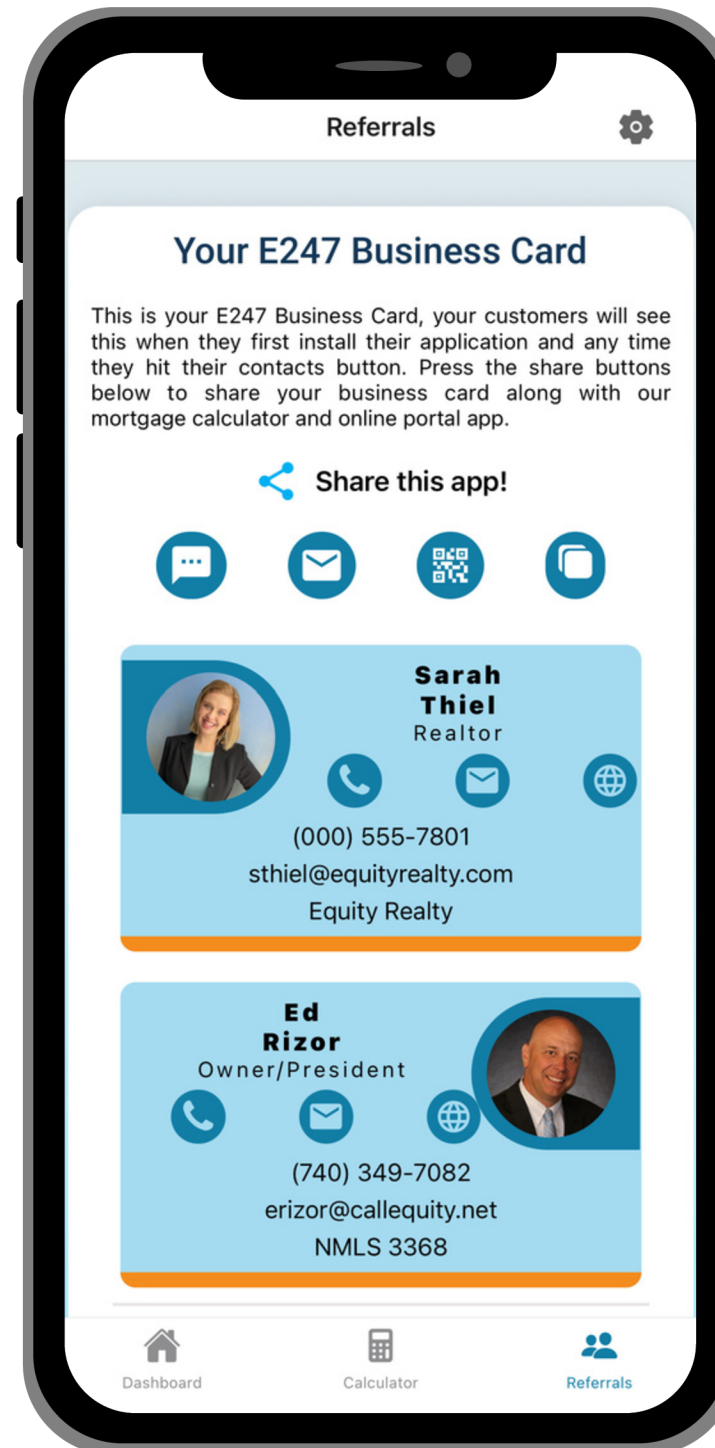
**\*The refinance calculator is only conventional at this time.**

Questions while filling in? There are information buttons available to help you along the way



# Referrals

This is the area where the Co branded business card is between you and your L0 partner



You are able to share this easily with your clients via text, email or a convenient bar code

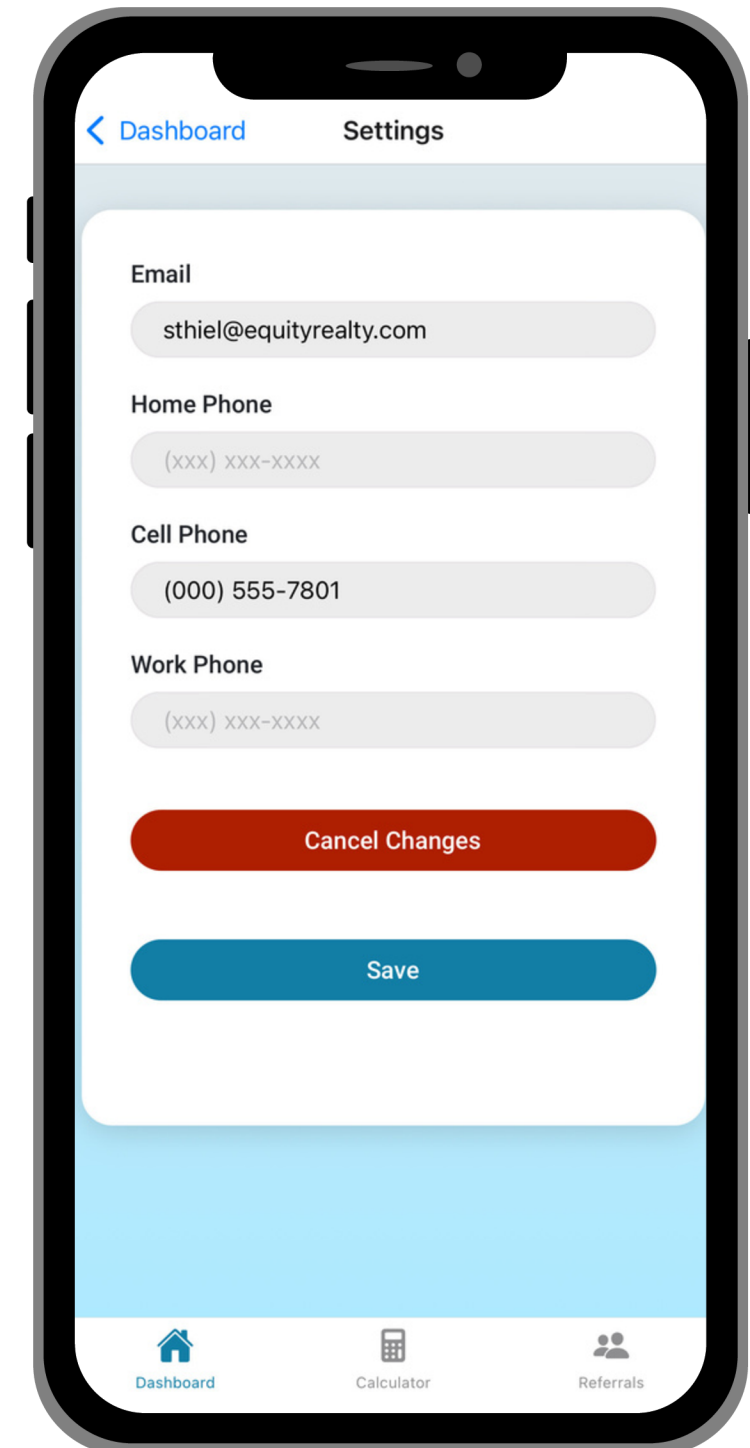
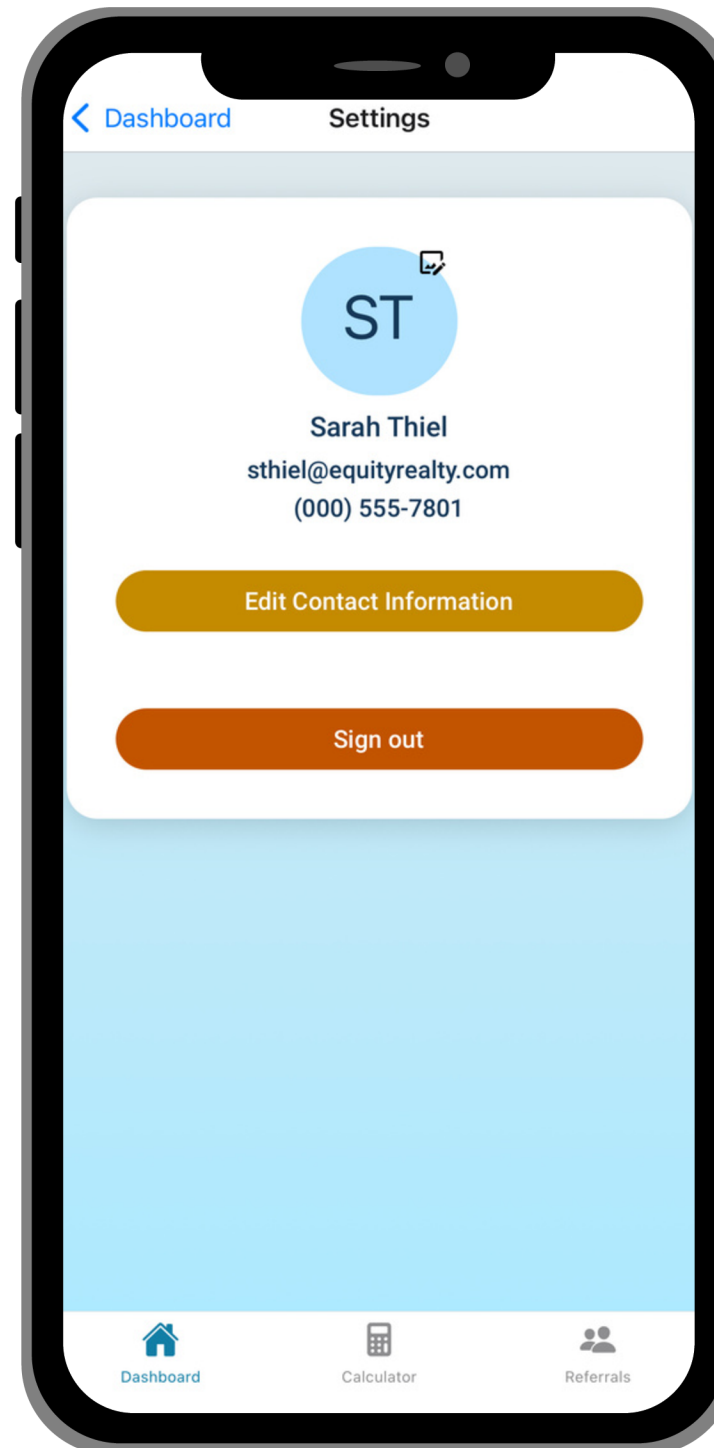
Excellent for referrals because when you send the card an option to download the borrowers side app appears

Shows the customers with your card shown here along with the last time the customer logged in



# Settings

The settings gear is where you can come and edit your information, even update your headshot!



# Frequently Asked Questions

**How do I log in the first time?**

**What if I do not have a loan with Equity Resources yet?**

**I would like to change my headshot on my cobranded card**

**How do I unblock the pictures from the download link?**

**Do I have to use the mobile side or is there a desktop version?**

**Can I access the appraisal from the E247 app?**



**EQUITY**  
RESOURCES, INC.  
*mortgages*

*Improving the lives of families.*