



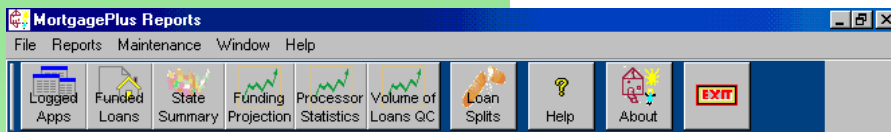
**FIGTREE**  
CONSULTING, INC.

# MortgagePlus

Help Manage Your Mortgage Business



**MortgagePlus** helps you get more from your Genesis 2000© data. This add-on product for Genesis 2000 allows you to get many additional reports with adjustable criteria to help you manage your mortgage business.



## MortgagePlus

- ◆ Helps manage your mortgage business with reports on loans in the pipeline, revenue, projected revenue, information to support regulatory reporting, and information to support commission calculations.
- ◆ Requires no additional data entry to run reports.
- ◆ Does not write to or disturb Genesis data.
- ◆ Splits loan counts and fees between loan officers.

## MortgagePlus Reports Include

- Logged Applications
- Funded Loans
- State Summary
- Funding Projection
- Total Fees earned by loan officer, ranked highest to lowest.
- Processor Performance
- Volume of Loans QC

You can enter split commission information in MortgagePlus and see split loans and fees in the reports.

See your data sorted by Loan Officer, State, Disposition, Date, Lender, Lien Position, Processor, Investor and more.

Use simple menus and pick-lists to choose the period, sort order and filters.

**For information on how MortgagePlus can help your company, contact Figtree.**

**Figtree Consulting, Inc.**

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## Funded Loans Criteria Selection Screen and Sample Report. (One of the MortgagePlus Reports)

Funded Loans

Selection Criteria for Report

**Type:**

Details  
 Subtotal

**Order by:**

State  
 Loan Type  
 Lender  
 Lien Position  
 Processor  
 Loan Officer  
 Loan Officer/Fees  
 Closer  
 Investor

All

State  NJ

Loan Type  [ ]

Lender  [ ]

Lien Position  [ ]

Processor  [ ]

Loan Officer  PAUL

Closer  [ ]

Investor  [ ]

Funded  from 01/01/03 to 06/30/03

Help
Preview
Print
Printer
Exit

### Funded Loans

The Funded Loans report provides key loan information including **Lender Rebates, Borrower Discount, Borrower Origination and Broker Fees.**

You can choose to sort and select key measurement criteria by a specific **State, Loan Type, Lender, Lien Position, Processor, Loan Officer, Closer or Investor** and the date range for **Funded** loans, or click the **All** boxes for any of these selections.

The reports can be ordered by any of the above categories plus **Loan Officer/Fees**. The sort by "Loan Officer/Fees" ranks loan officers based on the fees they generated in the selected period.

**Your Mortgage Company**  
**Funded Loans**

Loan Officer: PAUL State: NJ Funded: 01/01/03 to 06/30/03 Ordered by: Loan Type

07/29/03  
4:19 pm

\* Indicates Loan Count and Amounts are Split 50/50 Between Loan Officers

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FUNDED DATE	APPLICANT	PROCESS	LOAN OFFICER	APP NO.	SOURCE	LOAN AMOUNT	INT RATE ST	LENDER	INVESTOR	TYPE	LIEN POS	CLOSER	APP FEE	YIELD%	SPREAD\$	LINE%	LINES	TOTAL POINTS	FEES
<b>Loan Type: Conventional</b>																			
01/31/03	Carteret	FRANK	PAUL	8314	CRA	370,500	7.990 NJ		INVEST	Conventional	1st		395	1.000	3,705	1.000	3,705	2,000	7,410
01/13/03	Hair	SHEILA	PAUL	6245	FRIEND	250,000	7.600 NJ		INVEST	Conventional	1st		395	0.000	0	3.000	7,500	3,000	7,500
<b>Subtotal 1</b>						<b>Loan Count</b>	<b>2</b>	<b>620,500</b>					<b>790</b>	<b>0.597</b>	<b>3,705</b>	<b>1.806</b>	<b>11,205</b>	<b>2,403</b>	<b>14,910</b>
<b>Loan Type: FHA</b>																			
01/21/03	Interstate	FRANK	PAUL	5695		183,410	6.500 NJ	CHASE	INVEST	FHA	1st		0	3.375	6,190	0.763	1,774	4,138	7,964
<b>Subtotal 3</b>						<b>Loan Count</b>	<b>1</b>	<b>183,410</b>					<b>0</b>	<b>3.375</b>	<b>6,190</b>	<b>0.967</b>	<b>1,774</b>	<b>4,342</b>	<b>7,964</b>
<b>Grand Total</b>						<b>Loan Count</b>	<b>3</b>	<b>803,910</b>					<b>790</b>	<b>1.231</b>	<b>9,895</b>	<b>1.614</b>	<b>12,979</b>	<b>2,845</b>	<b>22,874</b>

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Select the report Type: **Details** or **Subtotal**.

- **Details** - Lists the Funded Date, Applicant, Processor, Loan Officer, Application Number, Source, Loan Amount, Interest Rate, State, Lender, Investor, Type, Lien Position, Closer (Document Signing Company), Application Fee, Yield %, Spread \$, Line %, Line \$, Total Points, and Fees for each loan that meets your selection criteria. This report also gives a summary with loan counts and loan amounts for each Loan Officer and grand total summary for the period.
- **Subtotal** - Lists only the summary with loan counts and loan amounts for each Loan Officer and grand total summary for the period.

The **Yield %** and **Spread \$** columns reflect the Lender Rebate percent and dollars.

The **Line %** and **Line \$** columns reflect a combination of borrower discount, borrower origination and broker fees and percents.

**NOTE:** On all Funded Loans reports that display the Loan Officer, an asterisk ("\*") will print by the Loan Officer if the Loan Officer has any split loans (summary level) or if the loan itself is split between two Officers (detail level).