MortgageExchange Ellie Mae to Servicing Director for Landmark Credit Union

Prepared For

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Landmark Credit Union

Created By

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The Problem

ABT's MortgageExchange allows software to "talk" to each other

With ABT's MortgageExchange™ in the middle, software platforms are able to transfer data.

Some mortgage software platforms are not designed to communicate with one another. The resulting solution is to have one of the organizations staff hand-key data from one platform to the other. The problem with this manual process are the human errors that can occur. Rushing to input data and miss-keying data, can cause issues. With regulators and auditors scrutinizing and auditing every detail of your mortgage business, mistakes can mean fines and penalties.

MortgageExchange™ solves that problem.

What You Need

Seamlessly Connect Your Mortgage Software and Third Party Services in our Secure Private Cloud

Many mortgage industry applications provide exceptional functionality—but what happens when you want to move your data between systems? Or what if you need functionality that existing applications don't deliver? When these issues arise, many mortgage-related companies are still manually reentering data or staying with systems that don't meet their needs.

ABT can help. By leveraging ABT's custom interfacing solution, MortgageExchange™, you can connect people, processes, partners, and information across dissimilar systems quickly and efficiently. Eradicate data re-entry and the costly errors and security issues associated with manual intervention.

Think of MortgageExchange™ as the Grand Central Station of mortgage data and processes. MortgageExchange™ is a custom data translation and software interface solution that allows you to automate and manage complex mortgage processes.

To keep your systems seamlessly communicating with one another, MortgageExchange™ allows you to build your own customized mortgage processing system using an application product set of your choosing. MortgageExchange™ acts as a central hub and the MortgageExchange™ connectors pointed to the software platforms you wish to connect, provides an intelligent data interface and processing service between your partners and your mortgage software.

Benefits of implementing MortgageExchange™ include:

- Avoiding Duplicate Data Entry
- Eliminating Errors and Inefficiencies
- No Servers, Software, Coding or Maintenance
- Customizable Interface Connectors
- Advanced Work Flow and Validation
- Ready-to-Run Interfaces
- Keep systems talking

The Solution

MortgageExchange™

Broad Product Lines

ABT provides dozens of cross application integrations that give our clients the edge in business processes. We work with many of the leading Mortgage LOS, Servicing and Core banking platforms available today. Our offerings are not static. As Organization seek integration solutions from ABT, we will research and study each new system if it is not in place already.

Business and Process Intelligence

By integrating Business Process Management capabilities with data integration, you advance your systems beyond their original capabilities. MortgageExchange™ allows you to leverage your data and processes by developing rules and activities in between, or in tandem with, your existing systems.

Data You Can Leverage

By accessing your application's data via ABT's cloud-based interface, you can more easily control the way it is used. Benefits of accessing your data from the cloud include increased reporting capabilities, the ability to program when data moves between platforms, and better integration with other applications.

Methods Based on Best Practices

ABT utilizes only best practice standards in all facets of our business. From top-level data transfer security to keeping up with changing mortgage industry regulations, we ensure that your processes are compliant. To ensure federal regulation compliance, ABT also maintains an SSAE16 Type II audit certification.

Peace of Mind

All ABT application upgrades and updates are tested in relation to the MortgageExchange™ interfaces to ensure that data and processes are performing perfectly. ABT designs, develops, deploys and manages the integration process with greater agility and speed than with a conventional local solution. Our cloud-hosted solution provides world-class security and reliability so that our clients get nothing but the best.

The Opportunity

Become a more efficient Mortgage Department

Minimize the number of hands that need to touch your mortgage data. With MortgageExchange™, one individual can monitor the translation results. The entire integration can become an automatic process.

Our cloud integration process ensures your data is flowing properly. If one of your software vendors makes changes to their platform, ABT makes the necessary changes to the interface to ensure data is flowing accurately. Customization with your organizational needs in mind are created as your solution is created.

This unique cloud based interface was created with multiple organizational needs in mind. You do not need to change your work flow or processes, MortgageExchange™ fits you.

Pricing

Products				
Name/Description	**Price**	**Qty**	**Discount**	**Subtotal**
Initial MortgageExchange™ environment equipment Setup and Configuration between LOS platform to D+H Servicing Director® (nonrecurring)	$1,200.00	1	10.00%	**$1,080.00**
Project Scope: Setup environment equipment for managed interface between LOS Platform and D+H Servicing Director® for data flow between the two. • Setup of the MortgageExchange™ production and development environments to standard specs. • Setup network VPN and firewall Note If VPN is used as data path: A onetime installation charge of not more than 4 hours @ $129.95/hr, will be required to build a VPN connection				
MortgageExchange interface Customization of Interface Connection - Programming (nonrecurring)	$13,700.00	1	10.00%	**$12,330.00**
Project Scope: • Analysis of system processes • Unique client configuration - Customization of system to fit needs of client • QA Note: there may be additional consultation hours @ software vendor's standard rate. Charges will be pre-authorized in writing by client and charges will be passed through to client.				
			Subtotal:	**$13,410.00**

Subscriptions are per month				
Name/Description	**Price**	**Qty**	**Discount**	**Subtotal**
MortgageExchange® Interface	$595.00 / Month	1		**$595.00 / Month**
Encompass to Servicing Director • Monthly hosting of single MortgageExchange® Interface • Interface between "Front end" and "Back end" Software • Maintaining the interface as created (core build) • Updating interface when changes are made by Software Vendors • Any changes or modifications to "core build" made by client through work orders • Disaster Recovery Environment included • T& M if needed for upgrade dev. Plus consulting charges from "Software Vendors" if needed Includes 300 transactions per month per paired connector(s) Additional transactions are $1.00 each (300 loan count resets each month to 0)				
optional ☐ Dev Environment for MortgageExchange® (Optional)	$99.00 / Month	1		**$99.00 / Month**
Products - Dev Environment (Optional) $99.00/month - Available 12 hours per day 5 days a week				
			Subtotal:	**$595.00 / Month**

Total cost: **$13,410.00**
+ $595.00 / Month

Agreement

MONTHLY HOSTING AGREEMENT

<u>Additional Terms:</u>

1. The original term of this Agreement shall be 24 months (the "Original Term"), commencing on the date of agreement signing. Client will be billed for the whole month. This Agreement shall automatically renew for successive extended terms (each, an "Extended Term") equal to one (1) year unless terminated in accordance with the Terms and Conditions.

2. This initial interface build will be known as the "core" build

3. 50% of non-recurring fees and monthly fees will be billed to start the project. When the project goes into production the remaining 50% of set up and 100 % of the monthly fees will be billed. This project should be completed by the 90 day time frame. Note: If the client requires additional time due to delays on "their side", ABT will provide an additional 2 months to the build time frame. After five (5) months from date of signing 100% of set-up fees and 100% of monthly fees will be due, whether the system is in production or not.

4. VPN Connection (if needed). A non-recurring installation fee of 4 hours @ $136.95 (per VPN). If two VPNs are required a fee of $100.00 /mo will be charged.

5. Client customizations, which are not part of our standard MortgageExchange build deliverable, may require additional fees. These customizations and resulting fees will be discussed with client, agreed upon by both parties in writing prior to action being taken.

6. ABT is providihg a Mortgage Exchange service for Client. This Mortgage Exchange aids in the transfer of data between two software programs being used by Client in their Mortgage Dept. The project utilizes SSL encryption when ABT is receiving data. Data will reside in ABT's hosting environment for translation and troubleshooting for the duration of time specified by client.

7. If the client requests additional work, (example: request for additional field(s) or functionality that was not part of the original project scope at time of "core" build), a work order will be generated and ABT's standard hourly rates will apply as needed: Tier rates are listed in the Terms and Conditions document sent with this Proposal. Any of this additional work will then become part of the "core build" and shall be included in the monthly hosting fee.

8. Tech Support Fees can be viewed at the following Site: www.myabt.com/rates

9. This Agreement shall be subject at all times during the Original Term and any Extended Term to the TERMS AND CONDITIONS (the "Terms and Conditions") document posted on ABT's website at http://www.myabt.com/legal/ASPTC.pdf. Client hereby acknowledges receipt of a copy of the Terms and Conditions concurrently with execution of this Agreement. The most current version of the Terms and Conditions can be viewed by clicking on the previously listed hypertext link. ABT reserves the right to alter the Terms and Conditions at any time without notice to client /customer. The Terms and Conditions may be altered notification to the client/customer (this applies to Landmark Credit Union), provided, however that the foregoing notification requirement shall not apply to modifications that could not reasonably be expected to cause a material adverse effect to client In the event of any conflict between the provisions of this Agreement and the Terms and Conditions, the provisions of this Agreement shall control.

1. Above pricing shall expire in (30) days from Sept. 17, 2024.

Laura Schoeneck

Landmark Credit Union

5445 S Westridge Dr

(262) 796-4500

Signed by:

_____   _____

Landmark Credit Union   Date

Access Business Technologies

Signature_____

Title:_____

Date:_____

About us

Who We Are

We're your access to Business Technologies (ABT)

THE MORTGAGE CLOUD COMPANY

Protecting and managing your mortgage work force in the cloud!

Access Business Technologies' s (ABT) provides a flexible cloud work space (MortgageWorkSpace™) that supports and protects mortgage professionals and their customers throughout the entire mortgage process.

We provide access to business technologies that empower mortgage professionals to safely perform at the top of their game anytime, anywhere. ABT proactively supports, defends and manages game-changing technologies and processes that help mortgage professionals excel.

We are a certified SSAE 16 Type II cloud services provider (CSP) to over 500 mortgage financial institutions (Banks, Credit Unions, and Mortgage Companies).

We are partnered with nearly a dozen leading mortgage software vendors (like Calyx and Ellie Mae and ComplianceEase) integrating our cloud suite of products with the best mortgage software in the world empowers your workforce to produce more quality loans safely anywhere anytime.