TRADITION mortgage

CLIENT EXPERIENCE ROAD MAP

START HERE

1 Contact Your Personal Tradition Mortgage Loan Officer

via phone or email

2 Initial Introduction

Conversation to gather information and uncover most appropriate loan option

3 Loan Officer Due Diligence

Product and program research. Identify product type and loan structure.

4 Presentation of Recommended Loan Scenarios

Explain most appropriate loan option based on due diligence

within 24 hours of #2

5 Submission of Loan Application

Application available via website or mobile app

within 24 hours of #4

6 Follow-Up Consultation

Go through initial eligibility, and initial review by TM. Submit necessary documents.

7 Loan Processing & Underwriting

Tentative closing date set + receive weekly updates from your loan officer

8 Progress Updates

You will be kept up to date with any significant milestones related to your loan file.

9 Final Review of Numbers

Review final numbers and issue closing disclosures

three days prior to closing

10 Loan Closing

Bring closing funds & sign final paperwork

+ BONUS +

+ Post- Close Follow Up Survey

We value your business and want to be your trusted mortgage source for life. Let us know how we did!

+ Ongoing Account Monitoring

Your account will be monitored and we'll reach out with any opportunities to improve your situation.

WWW.TRADITIONMORTGAGEMN.COM

NMLS #286998