Welcome to LoanBoss

Onboarding Overview

LOANBOSS

Keys to a Successful Onboarding

We break down the onboarding process into 3 smaller phases
1. Organization
2. Abstract
3. Go Live/Data Validation

All of these phases require collaboration. Even though we will most of the heavy lifting, we will need some help from your team.

- **Responsiveness** - *we know you have a day job and will work to minimize questions, but momentum is crucial*
- **Main point of Contact** - *either a single point person or a dedicated team*
- **Organization** - *the #1 thing that slows down onboarding is incomplete docs*

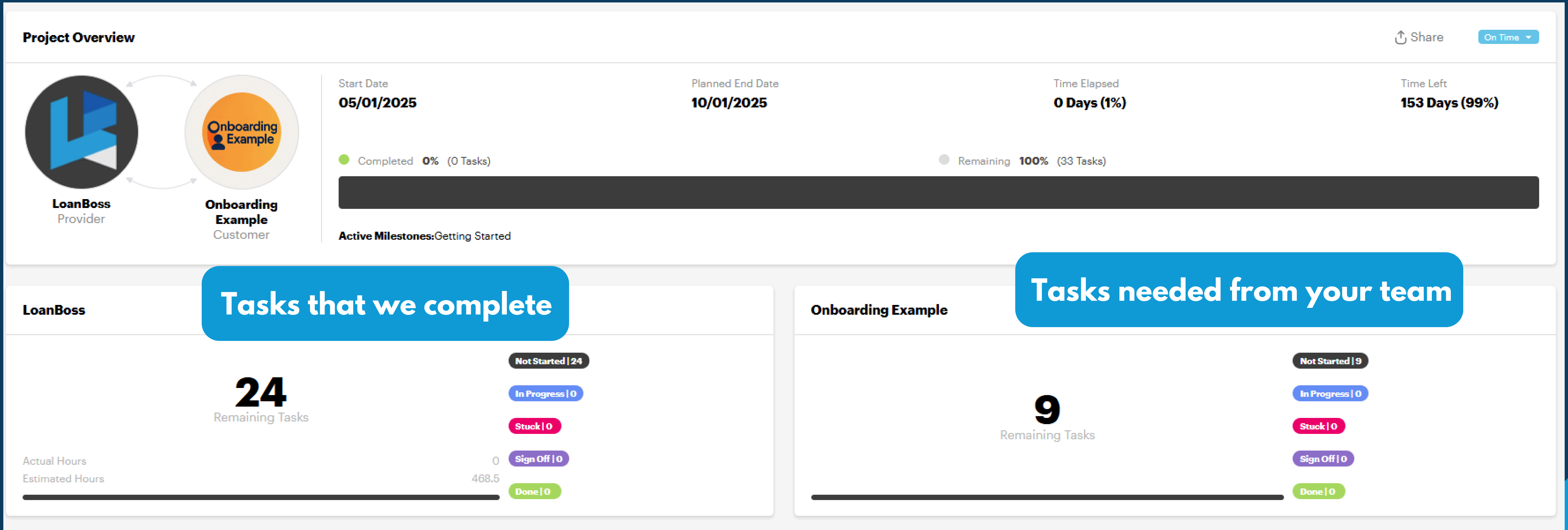
Organization Phase

You should have already received an email inviting you to your LoanBoss Onboarding Project.

There are tasks that include links granting you access to our onboarding resources and your secured **SharePoint** site.

- **Review and Assign Tasks** within your LoanBoss Onboarding Project
- Complete the **"List of Deals"** & **"Property Information"** tasks
- Upload your **Loan Documents**

LoanBoss Project Portal - Overview



Optional Strategy Meeting

- A brief meeting with a **few key members** of your team to assess how your company currently views your portfolio structure
- Here we will discuss the Reporting module as well as some potential ways to break down and **group** your portfolio effectively
- Some common groupings include:
  - Fund
  - Asset Manager
  - Location
  - Property Type

Custom Reports

LoanBoss includes a comprehensive suite of standard reports.

We also recognize that reporting needs vary and are available to replicate existing reports or assist in developing custom reports tailored to your requirements.

- Send us the reports you'd like duplicated in your LoanBoss account
- We can also have a meeting to discuss what you'd like to see reported and create a custom reports

Abstract Preview Call

- An in-depth preview of a few loans of your choosing within **LoanBoss**
- LoanBoss will present a **detailed review** of each loan
- This will be an **open discussion** to provide feedback on any abstract preferences
- You will also receive your **LoanBoss** logins

**onboarding hint: most companies have a standard debt summary that serves as a good cross reference*

Abstracting Loan Data

- Our Loan Specialist team will abstract your loans based on **your preferences**
- Each loan will undergo a rigorous **two-step** Quality Assurance process
- During this phase, we may request clarifying information and missing documents

Accounting Reports

Never run manual calculations again!

*Setting up your Accounting Software reports with LoanBoss gives you precise calculations in **real time**.*

Forecast projections based on forward curves, run budget scenarios, and map out cashflows with the touch of a button.

We'll send you a detailed guide for automating your Accounting Software Reports.

We will request the following financial reports:

- Income Statements with Cashflows
- Balance Sheet
- 12 Month Budget (forward looking)
- Commercial Tenancy Schedule

Example Onboarding Progression Outline

Kickoff Call

Review your Project Tasks

Complete the List of Deals

Send us Property Information

Upload your Loan Documents

Portfolio Strategy Discussion/Call (Optional)

Abstract Preview Call

Walk through 1-2 Abstracted Deals on a Preview Call

Abstract Loan Details

Quality Assurance Review

Send and automate Financial Reports (Pro & Pro+ Tiers)

Complete Data Validation (Reconcile Balances)

Sign off on Completed Loans

In-Depth LoanBoss Training Session

Set up Customizations

Organization

Abstract, QA Process, and Accounting Integrations

Data Validation & Training with Client Success Team

**Abstracting completion time may vary due to abstracting style and client responsiveness in providing documents.*

Next Steps

We ask that you start working on the assigned tasks such as:

- Completing the List of Deals & Property Information Onboarding Worksheet
- Start Uploading your Loan Documents
- Adding other team members to your project (if needed)

LET'S GET STARTED!

Onboarding Overview

LOANBOSS