

Step 1: Select a presentation from your pipeline.

Clients						RCH
Recent Clients	Strategy Templates				V	
First Name	Last Name	Presentation	Email	Last Updated	Referred	Fun
30yr vs 20yr vs 15yr - DE	мо			6/10/2022 12:58:02 PM	Sample Presentation	0
MI Options	80/10/10, LP, Monthly, Sing	jle		6/10/2022 12:56:29 PM	Sample Presentation	\bigcirc
Rate, Term & Debt Conso	51			11/20/2020 8:03:05 AM	Sample Presentation	\bigcirc
First Time Home Buyer	Advantage of rent vs own			11/20/2020 8:03:04 AM	Sample Presentation	\bigcirc
Move Up Buyer				11/20/2020 8:03:04 AM	Sample Presentation	\bigcirc
Fixed vs 5/1L, 7/1L, 10/1	L Focus on the ARM adj			11/20/2020 8:03:03 AM	Sample Presentation	0
COW: Cost of Wait	5% down or wait for 20%			11/20/2020 8:03:03 AM	Sample Presentation	0
Rate, Term & Cash Out R	əfi			11/20/2020 8:03:03 AM	Sample Presentation	6

Step 2: Click on the 'Closing Cost' tab for a given scenario.

MORTGAGECOACH. Ent	erprise Edition	CLIENT	PARTNER SETT	INGS HELP SIC
	Client	Next >	Tool	box
30yr Vs 20yr Vs	Let's start with some basic client information.	(92 Record Video	Preview &
13yl - DEMO	ls This Presentation For An Individual Or For General Marketing?			Highlight
8 Client ^	Individual Marketing		Show the comp	leted analysis.
- Contact	Is This A Strategy Template?		NOTES	
	No Yes	E	nter notes for your	client here:
두 Goals	Apply Strategy Template			
Assumptions	· · · · · · · · · · · · · · · · · · ·			
(š) Affordability 🗸 🗸	First Name:*			
	30yr vs 20yr vs 15yr - DEMO			
	Middle Name:		OR MORTGAGE MARKET	
- Closing Costs				
	Last Name:		Rate Indices Credit an	d LIV Rate Trends
			30-YR. CONFORMING	30-YR. JUMBO
	Date Of Birth:		J.JZU /0	J.007 ∕₀
	mm/dd/yyyy		30-Day Range: 5.270% - 5.526%	30-Day Range: 4.823% - 5.10
🖉 Analysis	Co-Borrower Firet Name-		30-YR. FHA	30-YR. VA
	Gorbonower machanie.			

Step 3: Once in 'Closing Costs' click the 'Closing Cost Details' button!

MORTGAGECOACH.	Ente	rprise Edition				CLIENT	PARTNER	SETTINGS	HEL	P SIGN	I OUT
		30yr							< Back	Next >	\mathbb{Z}
30yr Vs 20yr Vs 15yr - DEMO	5	Enter this product's closing of CLOSING COST DETAIL		Monthly s6.0k	9 Payment \$5,446.45						
Client	~	APR Related Closing Costs	Add Costs To Loan Amount	\$4.0k							-
		\$670.00		\$2.0k		\$1,75	20.46		\$2,030.2	3	_
Assumptions		Points 0.000%	Add Points To Loan Amount	\$0.0	30.98	20	YR		15VR		_
	~	Prepaid Int. Days	Add Prepaid Int To Loan Amount	_	30yr	20yr		15y	r		
	^	15		TOTAL LOAN AMOUNT:	\$800,000	\$224,000		\$224	,000		
- Closing Costs		Prepaid Escrows	Add Prepaid Escrows To Loan Amount	DTI:	N/A	N/A		N/A			
- Monthly Costs		\$0.00		LTV:	80.000%	80.000%		80.0	00%		
- Montally Costs		Non-APR Costs	Add Non-APR Costs To	POINTS:	\$0.00	\$0.00		\$0.0)		
	~	\$26,152.50		PREPAID INT. AMOUNT:	\$1,520.55	\$414.25		\$368	.22		
	~	Contributions	Add Contributions To Loan	CASH TO CLOSE:	\$228,343.05	\$63,174.7	5	\$63,	128.72		
		\$0.00									
	¥	Earnest Money \$0.00									

Step 4: Click 'LodeStar' to generate fees.

LODESTAR

Г	Closing Cost Det	ails			í de la compañía de l	
L	State	Select From Template	~	CLEAR ALL FEES	APPLY TO LOAN	ł
						ł
			Add a Fee to get started!			
	ل LODEST	AR Import fees from	n Lodestar.	AS		
	Points: \$0.00 Pr	enaid Interest: \$1.520.55	UEMIP/EE/GE/SP· \$0.00	Borrower Paid: \$0.00	Lender Paid: \$0.00	

Step 5: Select your title agent and any relevant details.

Property Addr	ess		New Subordinate Financing				
Zip*	State*	County	Number Of Subordinate Liens				
19403 Pennsylvania Montgomery			0				
City			Subordinate Financing	Amount			
West Norriton	I	~	\$0.00				
Township			Rehabilitation Cost	Water Quality Inspection			
Norristown		~	\$0.00	Standard			
Property Type			Title Agent				
Attached		~	AmericanHT				
Occupancy			Jumbo Loan?	Construction To Perm			
Primary Resid	ence	~					
le Thie A Refi?							

Step 6: Answer any additional questions about the property.

State	Select From Template	CLEAR ALL FEES	APPLY TO LOAN
	LodeStar Fees Selection	×	
	Buyer Paying Seller Taxes?		
	BACK	XT CANCEL	
👌 LODESTA	R ADD FEE ADD CUSTOM FEE	SAVE AS	
Pointe: \$0.00 Prov	anid Interact: \$1,520,55 LIEMIR/EE/CE/CP; \$0	00 Borrower Paid: \$0.00 Ld	ander Paid: \$0.00

Step 7: LodeStar generates fees. Click OK to move forward.

es.		
Amount	APR	Paid By
\$125	Yes	Borrower
\$4,673	No	Borrower
\$1,470.50	No	Borrower
\$170.75	No	Borrower
\$325	Yes	Borrower
\$1,114.35	No	Borrower
\$225	No	Borrower
	•	
	Amount \$125 \$4,673 \$1,470.50 \$170.75 \$325 \$1,114.35 \$225	Amount APR \$125 Yes \$4,673 No \$1,470.50 No \$170.75 No \$325 Yes \$1,114.35 No

Step 8: Click Add All Fees To Loan and then 'Apply To Loan' to add LodeStar's fees to your scenario.

~	~		CLEAR A	LL FEES		APPLY TO LOAN
Description	Method	Total	Paid By	APR	PPE	Add to Loan
Closing Protection Lette	er ~ \$125.00 + 0.000%	\$125.00	Borrower ~			
Lender's Title Insurance	\$4,673.00 + 0.000%	\$4,673.00	Borrower ~			
Owners Title Insurance	\$1,470.50 + 0.000%	\$1,470.50	Borrower ~			
Recording Fees	\$170.75 + 0.000%	\$170.75	Borrower ~			
Settlement Fee	<pre>> \$325.00 + 0.000%</pre>	\$325.00	Borrower ~			
Title Endorsement	<pre>> \$1,114.35 + 0.000%</pre>	\$1,114.35	Borrower ~			
Abstract or Title Search	<pre>\$225.00 + 0.000%</pre>	\$225.00	Borrower ~			
& LODESTAR	ADD FEE ADD CUST	TOM FEE SAVE A	\S	A	dd All Fe	ees To Loan