



Step 1: Select a presentation from your pipeline.

First Name	Last Name	Presentation	Email	Last Updated	Referred	Funded
		30yr vs 20yr vs 15yr - DEMO		6/10/2022 12:58:02 PM	Sample Presentation	<input type="radio"/>
	MI Options	80/10/10, LP, Monthly, Single		6/10/2022 12:56:29 PM	Sample Presentation	<input type="radio"/>
	Rate, Term & Debt Consol			11/20/2020 8:03:05 AM	Sample Presentation	<input type="radio"/>
	First Time Home Buyer	Advantage of rent vs own		11/20/2020 8:03:04 AM	Sample Presentation	<input type="radio"/>
	Move Up Buyer			11/20/2020 8:03:04 AM	Sample Presentation	<input type="radio"/>
	Fixed vs 5/1L, 7/1L, 10/1L	Focus on the ARM adj		11/20/2020 8:03:03 AM	Sample Presentation	<input type="radio"/>
	COW: Cost of Wait	5% down or wait for 20%		11/20/2020 8:03:03 AM	Sample Presentation	<input type="radio"/>
	Rate, Term & Cash Out Refi			11/20/2020 8:03:03 AM	Sample Presentation	<input type="radio"/>

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

Client Information Form:

- Is This Presentation For An Individual Or For General Marketing? Individual Marketing
- Is This A Strategy Template? No Yes
- Apply Strategy Template: [Dropdown]
- First Name: 30yr vs 20yr vs 15yr - DEMO
- Middle Name: [Text Field]
- Last Name: [Text Field]
- Date Of Birth: mm/dd/yyyy
- Co-Borrower First Name: [Text Field]

OB MORTGAGE MARKET INDICES:

Rate Indices	Credit and LTV	Rate Trends
30-YR. CONFORMING 5.526% ▲0.018 30-Day Range: 5.270% - 5.526%	30-YR. JUMBO 5.067% ▲0.011 30-Day Range: 4.823% - 5.104%	
30-YR. FHA 5.270%	30-YR. VA 5.148%	



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

The screenshot shows the 'Closing Costs' section of the Mortgage Coach software. A red arrow points to the 'CLOSING COST DETAIL' button. The interface includes a sidebar with navigation options, a main form for entering closing costs, and a 'Monthly Payment' bar chart and table.

	30yr	20yr	15yr
TOTAL LOAN AMOUNT:	\$800,000	\$224,000	\$224,000
DTI:	N/A	N/A	N/A
LTV:	80.000%	80.000%	80.000%
POINTS:	\$0.00	\$0.00	\$0.00
PREPAID INT. AMOUNT:	\$1,520.55	\$414.25	\$368.22
CASH TO CLOSE:	\$228,343.05	\$63,174.75	\$63,128.72

Step 4: Click 'LodeStar' to generate fees.

The screenshot shows the 'Closing Cost Details' screen. A red arrow points to the 'LODESTAR' button. The screen includes a 'State' dropdown, a 'Select From Template' dropdown, and a 'CLEAR ALL FEES' button. The main area contains the text 'Add a Fee to get started!'.

Points: \$0.00 Prepaid Interest: \$1,520.55 UFMIP/FF/GF/SP: \$0.00 Borrower Paid: \$0.00 Lender Paid: \$0.00

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

The screenshot shows the 'LodeStar Fees Selection' form with the following fields and values:

- Property Address: [Empty text box]
- Zip*: 19403
- State*: Pennsylvania
- County: Montgomery
- City: West Norriton
- Township: Norristown
- Property Type: Attached
- Occupancy: Primary Residence
- Is This A Refi?: [Empty checkbox]
- New Subordinate Financing: [Empty checkbox]
- Number Of Subordinate Liens: 0
- Subordinate Financing Amount: \$0.00
- Rehabilitation Cost: \$0.00
- Water Quality Inspection: Standard
- Title Agent: AmericanHT
- Jumbo Loan?: [Empty checkbox]
- Construction To Perm: [Empty checkbox]

Step 6: Answer any additional questions about the property.

The screenshot shows the 'Closing Cost Details' screen with a modal dialog box open. The modal dialog is titled 'LodeStar Fees Selection' and contains the following content:

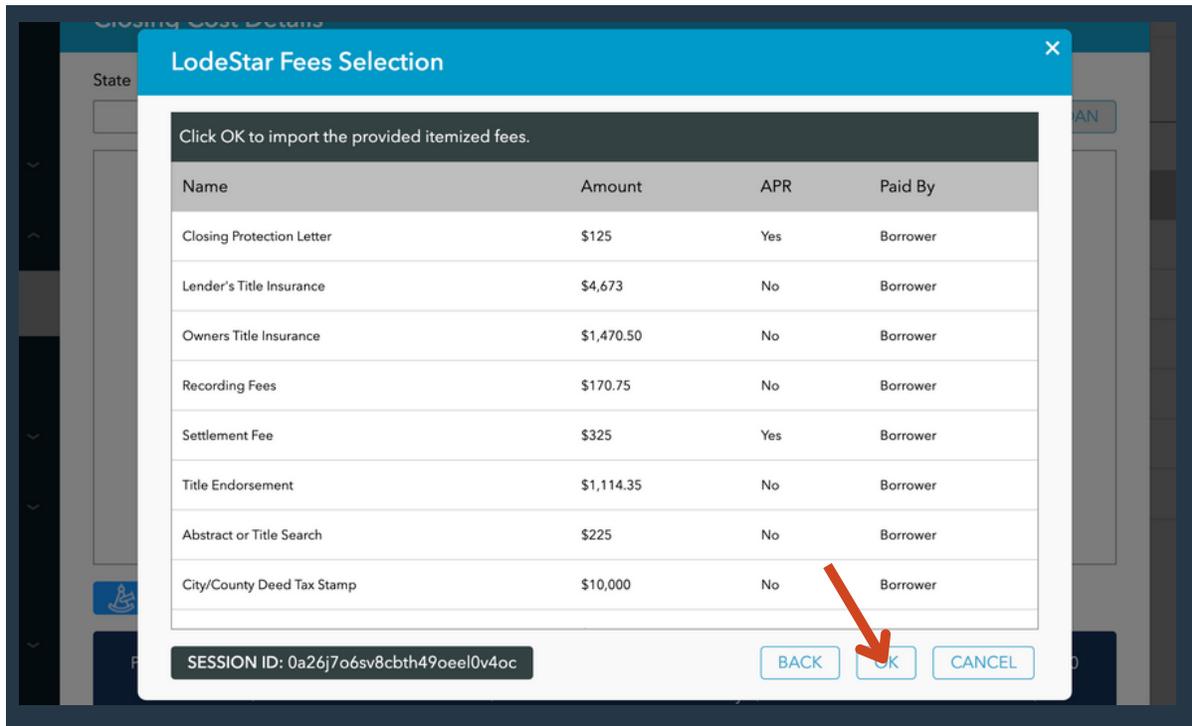
- Buyer Paying Seller Taxes? [Checked checkbox]
- Buttons: BACK, NEXT, CANCEL

The background screen shows the 'Closing Cost Details' form with the following elements:

- State: [Dropdown menu]
- Select From Template: [Dropdown menu]
- Buttons: CLEAR ALL FEES, APPLY TO LOAN
- LODESTAR logo and buttons: ADD FEE, ADD CUSTOM FEE, SAVE AS
- Summary bar at the bottom:

Points: \$0.00	Prepaid Interest: \$1,520.55	UFMIP/FF/GF/SP: \$0.00	Borrower Paid: \$0.00	Lender Paid: \$0.00
Seller Paid: \$0.00	Broker Paid: \$0.00	Earnest Money: \$0.00	MIP Paid In Cash: \$0	

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



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

