

BEAT – Goldmine

<p>Company: <a href="#">Renfro Construction</a>          Contact: <a href="#">Rachelle Nelson</a>          CoBor First: <a href="#">Greg</a> Last: <a href="#">Nelson</a>          Dear: <a href="#">Rachelle and Greg</a> Last: <a href="#">Nelson</a>          OptInOut: <a href="#">Yes</a></p>	<p>B1 Home: <a href="#">(800)709-3562</a> Best Phone: <a href="#">B2 Cell</a>          B1 Work: <a href="#">(800)776-7889</a> Ext:          B1 Cell: <a href="#">(800)654-3526</a> Pager:          FAX: <a href="#">(719)536-0620</a>  <a href="mailto:Rachelle@yahoo.com">E-mail: Rachelle@yahoo.com</a>  <a href="#">Web Site:</a></p>
<p>Mailing Addr: <a href="#">1150 Kelly Johnson Blvd.</a>          :          :          City: <a href="#">Colorado Springs</a>          State: <a href="#">CO</a> Zip: <a href="#">80920</a>          Market Level: <a href="#">Platinum - 5 Million Club</a> Merge:</p>	<p>Contact Type: <a href="#">Client</a>          Status: <a href="#">Prospect</a>          Referred By: <a href="#">Insurance Agent</a>          Refer Name: <a href="#">Heather McClennan</a>          Loan Officer: <a href="#">Frank Darling</a></p>

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\*\*\*\* COMMUNICATION INFO \*\*\*\*

<p>Best Point of Contact...</p> <p>Contact : <a href="#">Rachelle Nelson</a> &gt;: X          Co Bor : <a href="#">Greg Nelson</a> &gt;:          Method : <a href="#">Co Bor Email</a>          Time : <a href="#">Afternoon (12:00 - 5:00)</a></p>	<p>Enter X to select :</p>	<p>Sales Information... ( Provides the Data to Prioritize)</p> <p>Decision Maker : <a href="#">Co Borrower</a>          Capability Level : <a href="#">Less Than 30 Days</a>          Motivation Level : <a href="#">90+ Days</a></p>
<p>Co Borrower Contact Information...</p> <p>Home Phone: <a href="#">(408)567-6666</a> Best Phone: <a href="#">Email</a>          Work Phone: <a href="#">(408)777-6666</a> Ext : <a href="#">65</a>          Fax : <a href="#">(408)555-5555</a>          Cell : <a href="#">(408)444-4444</a> Pager : <a href="#">(408)777-8888</a>          Email : <a href="mailto:hank.ford@bcbsbcsglobal.net">hank.ford@bcbsbcsglobal.net</a>          Web Site : <a href="http://www.netapex.com">www.netapex.com</a></p>	<p>Last Results...</p> <p>: <a href="#">Very motivated to buy/sell since they need 1 more be</a>          : <a href="#">Going on vacation for 4 weeks, so purchase shoppin</a>          : <a href="#">suspended until their return. Will call when they get b</a></p>	

Rule-Based selection

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# BEAT – Goldmine

Summary Fields Contacts Pending History Links GM+View Notes Details

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**\*\*\* MARKETING HIGHLIGHTS \*\*\***

Tax Analysis : No	My Rate Alert : Yes	Name...	First Name..
High/Low Index : 8.99 / : 0	ARM Change Date: Apr 10, 09	Loan Officer : Rhonda Whittaker	: Rhonda
Next Financial Change : College Financing	(*Schedule on Calendar)	Processor : Kathy Goodhew	: Kathy
Financial Change Date : May 6, 08		Mktg Assist. : Guy Herner	: Guy

**\*\*\* CLIENT INFO \*\*\***

<b>Contact Information...</b>		<b>Co Borrower Information...</b>	
Name : Rachelle	: Nelson	Name : Greg	: Nelson
Marital : Married	SSN: 1111111111	Marital : Married	SSN: 222222222
Birthdate : Jun 4, 62	Wed: Jan 1, 05	Birthdate : Apr 1, 06	

<b>Contact Interests...</b>		<b>Co Borrower Interests.</b>	
Hobbies : Hiking/Cycling		Hobbies : City Soccer League	
Restaurant : Chinese		Restaurant : Outback Steak House	
Gift Cert :		Gift Cert :	

Comments: Couple went on Fear Factor in 2004 - very adventurous !

**Children Information...**

Name: Milly	Name: Harold	Name: Renee	Name: Derreck
BDay: Jan 1, 84	BDay: Jun 14, 85	BDay: Nov 14, 89	BDay: Jan 1, 19

Select Primary Fields ▶

Properties...

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New Field

Screen Design...

Screens Setup...

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**\*\*\* MORTGAGE COACH \*\*\***

In your opinion, what is your ultimate goal with this mortgage ? : Lower monthly payment without giving up equity over 5 years

How long do you expect to be in this home and/or keep this mortgage ? : 5

Have you spoken with other lenders, who ? : If so, what programs did you like ? : ARM 5/5

Please rank the following priorities in the order of personal importance 1-6, One being the most important:

Speed of Loan Process : 3	Requested Documentation : 6	Early Mortgage Payoff : 6
Lowest Rate : 4	Lowest Overall Cost : 2	Lowest Up-Front Cost : 5

Comments : Plan to move to San Diego when youngest child graduates High School.

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New Field

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Screens Setup...

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## \*\*\* LOAN INFORMATION \*\*\*

\* Subject Property Address \*:       : 4210 Curtner Ave                               : Boulder                               : CO                               : 89066

Mtg Anniversary : Sep 14, 04	Lender/Investor : CountryWide	Loan No : 890217688-ry	Document Type : NINA
Trigger Rate : 0.000	Loan Program : 5/5 ARM	Purpose : Rate / Term Refinance	Occupancy : Primary
1st Note Rate : 4.589	1st Loan : 700000.00	1st Term : 360	
2nd Note Rate : 0	2nd Loan : 0	2nd Term : 240	Pre-Pay 1st / Date : Yes : Sep 15, 04
Sales Price : 450000.00	Appraisal Value : 0.00		Pre-Pay 2nd / Date : Yes : Sep 5, 04
	LTV/CLTV : / :		PMI / Review Date : No : Aug 29, 04

Loan Notes : This is 3rd Refi -- Client wants to take advantage of new low rates. when it matters he refied. Yes

## \*\*\* IN PROCESS STATUS \*\*\*

Est Close : Nov 5, 04	Loan Open : Sep 9, 04	Submitted : Sep 6, 04	Approval : Sep 9, 04
Docs Ordered : Sep 28, 04	Docs Out : Sep 9, 04	Docs Signed : Sep 6, 04	Docs Back : Sep 4, 04
Loan Funded :	Actual Close : Sep 3, 04		

\* Lock Date : Sep 7, 04       \* Lock Exp : Sep 3, 04       \* Lock Ext : Sep 6, 04

Cancel Date : Sep 2, 04       Reason for Cancellation : Funds from parents were withdrawn. Client could not come up with downp

SyncMaster ID:  
(For use with optional automated Synchronization)

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Summary Fields AM+view Notes Contacts Details Referrals Pending History

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## \*\*\* REFERRALS IN/OUT \*\*\*

REFERRAL INTO Our Team :

Referred By: Insurance Agent

Refer Name: Heather McClennan

REFERRALS FROM Our Team to Professional Affiliates :

Type of Referee...

Name of Referee...

Realtor	:
CPA	:
Financial Planner	:
Insurance Agent	:
Builder	:
Other	:

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- 
- Cancel

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### \*\*\* SELLING RE / BUILDER \*\*\*

Are You Working With ?	Rate	Company	Name	If Referred to Affinity Partner - Complete End Result:
Sell Agent : YES	: 4	: Coldwell Banker	: Anthony Czerwinski	: Show Property
Financial Contingency : Oct 5, 04				

**Selling Agent...**

Company : Century 21  
 Full Name : Anthony Thomas  
 Address : 3419 South 800 4th Street West  
 City, St, Zip : Salt Lake City  
 : Salt Lake City  
 : UT : 89333  
 Dear : Anthony  
 Work Phone : (786)321-4444 Cell :  
 Direct Dial : (897)234-7878 Fax : (440)867-5232  
 Email : anthonyczerwinski@hotmail.sbcglobal.net  
 Contract Status : Ordered Due Received  
 : Sep 7, 04 : Sep 8, 04 : Sep 9, 04

**Builder...**

Company : Builder Company  
 Full Name : Builder Bob  
 Address : 123 Builder Drive  
 City, St, Zip : Persnikity , New York 78999-6767  
 : Builder City  
 : CO : 88777  
 Dear : Builder  
 Work Phone : (896)777-6999 Cell : (408)623-2089  
 Direct Dial : (555)444-3333 Fax : (777)888-6666  
 Email : builder@hotmail.com  
 Contract Status : Ordered Due Received  
 : Sep 4, 04 : Sep 6, 04 : Sep 9, 04

Edit End RE

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Select Primary Fields ▶

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Properties...

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Rule-Based selection

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### \*\*\* LISTING RE / SELLER \*\*\*

Are You Working With ?	Rate	Company	Name	If Referred to Affinity Partner - Complete End Result:
List Agent : YES	: 5	: Pacific Property Partners	: Rhonda Clemens-Worthington	: Referred To Another Agent

**Listing Agent...**

Company : Zuogat Realty - Prudential Subsidiary  
 Full Name : Rachael Neidermeyer  
 Address : 42310 East 1800 South, Ste 12786-A  
 City, St, Zip : Raleigh, NC 89675-6543  
 : Raleigh  
 : NC : 89675-6543  
 Dear : Rachael  
 Work Phone : (888)777-6666 Cell : (667)554-3131  
 Direct Dial : (888)666-4444 Fax : (999)888-6666  
 Email : rachel.neidermeyer@sbcglobal.net.yahoo.com

**Seller...**

Full Name1 : Thomas Gerttun  
 Full Name2 : Sandy Thomas  
 Address : 123 Escrow Lane  
 City, St, Zip : Raleigh, NC 89675-6543  
 : Raleigh  
 : NC : 89675-6543  
 Dear : Thomas and Sandy  
 Work Phone1 : (408)365-7762 Home Phone : (408)365-7707  
 Work Phone2 : (333)888-7676 Fax : (909)678-8989  
 Email : tomger@hotmail.com

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### \*\*\* ESCROW / TITLE \*\*\*

**Escrow / Closing Company...**

Company : Escrow USA  
 Full Name : Thomas Gerttun  
 Address : 123 Escrow Lane  
 City, St, Zip : Raleigh, NC 67599-0909  
 : Escrow  
 : CO : 78666  
 Dear : Thomas  
 Work Phone : (408)365-7762 Fax : (909)678-8989  
 Escrow # : 3489761-CHFVRQ//2489HYEAR END  
 Email : tomger@hotmail.com  
 Escrow Instructions Ordered Due Received  
 : Sep 4, 04 : Sep 5, 04 : Sep 8, 04

**Title Company...**

Company : American Financial Title Company  
 Full Name : Theodore Reynolds Turner  
 Address : 908 East YellowTail Avenue, Ste 564-B  
 City, St, Zip : Lake Wobegon, NY 89766-3211  
 :  
 :  
 Dear : Ted  
 Work Phone : 997776666 Fax : 999888666  
 Order # : 896786786786678//98798798HELOC  
 Email : tedt@yahoo.com  
 Title Instructions Ordered Due Received  
 : Sep 5, 04 : Sep 3, 04 : Sep 8, 04

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### \*\*\* APPRAISER / INSURANCE \*\*\*

Are You Working With ?	Rate	Company	Name	If Referred to Affinity Partner - Complete End Result:
Insurance Agent	: YES	: 3 : MetLife Prudential	: Iris Raleigh-Neidermeyer	: Reviewed Policies

**Appraiser...**

Company : Sakyoryi Appraisal Services  
 Full Name : Alan Sakyoryi  
 Address : 23908908 Almaden Expressway  
 City, St, Zip : Bennington , Fla 8666-8989  
 :  
 :  
 Dear : Alan  
 Work Phone : (888)777-6666 Fax :  
 File # : 8908080-norred court  
 Email : dakoryi.yellowwik@yahoo.com  
 Appraisal Status Ordered Due Received  
 : Sep 3, 04 : Sep 5, 04 : Sep 8, 04

**Insurance Agent...**

Company : Yokahamo Insurance - Prudential  
 Full Name : Mary Ann Henderson  
 Address : 7897-7655 East Waylon Road  
 City, St, Zip : Raleigh, NC 89777-9898  
 :  
 :  
 Dear : Mary Ann  
 Work Phone : (777)666-5555 Fax : (999)777-9379  
 Policy # : 78565-Heilliny  
 Email : maryann.henderson@sbcglobal.net  
 Insur Policy Status Ordered Due Received  
 : Sep 4, 04 : Sep 7, 04 : Sep 4, 04

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## \*\*\*\* KEY PROFESSIONALS \*\*\*\*

Are You Working With ?	Rate	Company	Name	If Referred to Affinity Partner - Complete End Result:
CPA : YES	: 10	: CPA of America	: Charles Prudential	: Not Hired
F-Planner : NO	: 5	: FIN Planners Prudential	: Financial Francis Scott Key	: Accepted Advise
Estate Planner : YES	: 0	: Wachovia Estate Planning	: Walter Estevez-Hernandez	: Reviewed Estate

### CPA / Accounting Firm...

Company : CPA Company  
 Full Name : Brad Rudner  
 Address : 123 CPA Drive  
 City : CPA City  
 State, Zip : CO : 89033  
 Dear : Brad  
 Work Phone : (896)777-6767  
 Direct Dial : (656)444-3232  
 Cell : (408)623-2089  
 Fax : (909)678-8989  
 Email : brad@sbcglobal.net

### Financial Planner...

Company : CFP Services Inc  
 Full Name : Ghridra Talbert  
 Address : 123 Fina Planner Way  
 City : Richardson  
 State, Zip : TX : 75080  
 Dear : Ghridra and Thomas  
 Work Phone : (777)897-5656  
 Direct Dial : (789)654-3232  
 Cell :  
 Fax : (909)678-8989  
 Email :

### Estate Planner...

Company : Estate Planning Inc  
 Full Name : Andrew Shanbrom  
 Address : 123 Est Planning Drive  
 City : Estate Planner City  
 State, Zip : CO : 89033  
 Dear : Andrew  
 Work Phone : (896)777-6777  
 Direct Dial : (897)656-4545  
 Cell : (408)623-2089  
 Fax :  
 Email : andrew@hotmail.com

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## \*\*\* EMPLOYMENT INFORMATION \*\*\*

**Contact Credit Information...**

C/C Payments : 350.00    Balance : 42000.00  
 Install Payments : 0.00    Balance : 1890345.00  
 FICO Scores : 600    : 800    : 592

**CoBor / Spouse Credit Information...**

C/C Payments : 4500.00    Balance : 1890345.00  
 Install Payments : 200.00    Balance : 12000  
 FICO Scores : 700    : 650    : 456

**Financial Snapshot...**

Total Monthly Debt : 4500.00  
 Total Liability : 89000.00  
 Total Annual Inc : 175000.00  
 Total Retirement : 250000.00  
 Total Liquid Asset : 4500.00

**Contact Employment Information...**

Company : Renfro Construction  
 HR Contact : Danielle Stepheson-Davis  
 Address : 3489 North Tasman Drive, Bldg 4-c  
 City, St, Zip : South Tallahassee, FL 89765-7856  
 Dear : Danielle

**CoBorrower/Spouse Employment Information...**

Company : Retrofit Systems International  
 HR Contact : Horatio Malcom  
 Address : 8989 Port of Call Drive, Warehouse 120h  
 City, St, Zip : South Bend , Oregon 87987-a553  
 Dear : Horatio

**Contact Employment / Income...**

Job Title : Senior VP - Marketing  
 Department : Marketing  
 #of Job Changes : 15    Age : 43  
 Gross Income : 1000000.00    Other Inc. : 45789.00  
 Next Raise : Oct 8, 04    Amount : 2500.00  
 Next Promotion : Dec 9, 04    Time on Job : 5 years

**CoBorrower/Spouse Employment Income...**

Job Title : Administrator  
 Department : Health and Human Services  
 # of Job Changes: 4    Age : 54  
 Gross Income : 1899000.00    Other Inc : 12000.00  
 Next Raise : Dec 9, 04    Amount : 50000.00  
 Next Promotion : Sep 6, 04    Time on Job : 25 years

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\*\*\*\* MID PROCESS SURVEY \*\*\*\*

I was calling to make sure you are completely satisfied with the manner in which your transaction has been managed so far. Do you have a few minutes to answer a few brief questions ? I am always looking for ways to improve my service to you and would appreciate your candid feedback. Please rate the following questions on a scale of 1 to 5. 1 being poor and 5 being best.

	Rating
Have we done a good job determining your mortgage needs ?	: 1
Have we returned your calls promptly ?	: 2
Have we answered your questions to your satisfaction ?	: 3
Have we kept you informed regarding the status of your loan ?	: 4
Have you found everyone on the team to be courteous and professional ?	: 5
Are you willing to refer us to your family and friends ?	: 1
What can we do better ?	
: I am not sure what happens 1st, 2nd, 3rd...can you provide a timeline ?	

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- New Field
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- Screens Setup...

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- Cancel

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## \*\*\* GOALS \*\*\*

### Retirement Goals...

In how many years do you plan to retire ?  
 1 - 5 : 5  
 6 - 10 : 8  
 11 - 20 : 15  
 Are you interested in buying real estate for investment purposes ?  
 : Yes  
 Are you anticipating any extraordinary changes in the next five years ?  
 : My son will be going away to college in Spring 2005

### Financial Goals...

In your opinion, what is your worst financial issue / liability ?  
 : Mortgage  
 In your opinion, what is your greatest financial asset ?  
 : Home  
 How old would you like to be when you pay this mortgage off ?  
 : 55

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## \*\*\* ADDITIONAL PROPERTIES \*\*\*

### Property 1...

Address : 3578 henry way  
 Close Date : Sep 8, 04 Sales Price / Value : 0.00  
 1st Loan : 890777.00 % : 6.870 1st Type : VA  
 2nd Loan : 10000.00 % : 10.670 2nd Type : Heloc  
 Occupancy : Primary Transaction Type : Cash Out - Refi  
 Notes : WANTS TP REFI

### Property 2...

Address : 6786 Helling Lane  
 Close Date : Sep 9, 04 Sales Price / Value : 0.00  
 1st Loan : 700000.00 % : 5.890 1st Type : Conventional  
 2nd Loan : 15000.00 % : 4.988 2nd Type : Interest Only  
 Occupancy : Vacation Transaction Type: Purchase  
 Notes : adaqdqwdqsdqdfwefgwegwegwegwegwegwegwge

### Property 3...

Address : 234 Whitaker Lane  
 Close Date : Sep 3, 04 Sales Price / Value : 0.00  
 1st Loan : 90865655.0 % : 12.786 1st Type : FHA  
 2nd Loan : 34900.00 % : 4.765 2nd Type : Purchase Money  
 Occupancy : Investment Transaction Type: Rate/Term - Refi  
 Notes : masf:wflkmgwmpofpwp3mfpowmefpowmefpowmfpwo

### Property 4...

Address : u786 Gulling Island adaven  
 Close Date : Sep 4, 04 Sales Price / Value : 0.00  
 1st Loan : 900675.00 % : 5.897 1st Type : Jumbo  
 2nd Loan : 1400.00 % : 12.897 2nd Type : Heloc  
 Occupancy : Primary Transaction Type: Cash Out - Refi  
 Notes : nocnasoiunciwuoncvoiuwenciuneiudcnweiundciuwen

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## \*\*\* ALTERNATE CONTACT(S) \*\*\*

### Home Address (If not the same as Mailing)...

Home P.O. Box : P.O. Box 42130  
 Home Address1 : 123 Gull Scenic Dive  
 Home City, St, Zip : Lake Rainer : WA : 98766-2675

### 2nd Contact...

2nd Contact Name : Franny Tarkenton  
 2nd Contact Title : Attorney  
 2nd Contact Phone : (897)666-5454 Ext : 43  
 2nd Contact Email : franny.tarkenton@sbcglobal.net

### Assistant...

Assistant Name : Paul Franlin  
 Asst. Title : Executive Assistant  
 Assistant Phone : (908)777-6565 Ext : 432  
 Assistant Email : franklinp@fidelitytrust.net

### 3rd Contact...

3rd Contact Name : Rachel Bond  
 3rd Contact Title : Estate Attorney  
 3rd Contact Phone : (897)666-5454 Ext : 1  
 3rd Contact Email : rachel@americanapex.net

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