







Mortgage System Comparison

						
Subscription Pricing				\$79/Month	\$99/Month	\$199/Month
Submit to all Lenders	✓	✓	✗	✗	✗	✗
Filogix Expert Integration	✓	✓	✓	✓	✓	✓
Online Client Journey/Application	✓	✗	✓	✓	✓	✓
Client Portal	✓	✗	✗	✓	✓	✓
Client Experience ¹	✓	✗	✗	✗	✓	✓
Deal Dashboard Management	✓	✗	✗	✓	✓	✓
Activity Notifications	✓	✗	✓	✗	✗	✓
Conditions Management	✓	✗	✗	✓	✓	✓
Document Storage	✓	✓	✓	✓	✓	✓
Smart Conditions to request Documents	✓	✗	✓	✗	✓	✓
Compliance Document Creation	✓	✓	✓	✓	✗	✓
Down Payment/ Bank Account Verifications ²	✓	✗	✗	✓	✗	✓
Digital Signatures/eSign ³	✓	✗	✗	✓	✓	✓
Custom Reporting	✓	✗	✓	✓	✓	✓
Custom Process Workflows	✓	✗	✗	✗	✗	✓
Mobile App Integration	✓	✗	✓	✗	✗	✗
Compliance Management	✓	✓	✓	✓	✗	✓
Payroll Integration ⁴	✓	✗	✓	✓	✗	✗
Integrated CRM and/or connect to external CRM	✓	✓	✓	✓	✓	✓
Priority Live Support ⁵	✓	✓	✓	✗	✓	✓
Custom Branding	✓	✓	✗	✓	✓	✓
Data Ownership, Security & Privacy Policy ⁶	✓	✓	✓	✗	✓	✓

1. Client Experience is the combination of an online credit application and secure document portal to provide Mortgage Brokers the means to obtain both the application content and the requested supporting documents at the same time. Velocity offers CE as a Broker powered offering and FINMO offers it as a system generated offering. Ask us for more details.

2. Bank Account verifications are provided as integrated services for clients to securely access and share their account statement histories using a universal portal provided by Canadian financial tech (fintech) solutions. Pricing varies by offering

3. Templated eSign consents and compliance documents are created for simple and repeatable use. Each platform has their own pricing plan with Velocity offering free unlimited eSign for the balance of 2020.

4. Payroll and Compliance management are provided by some as separate, additional subscription solutions payable by the brokerage. Velocity provides an integrated master compliance file solution and offers an EZ Payroll add-on for brokerage commission management.

5. Live Support includes access to a Canadian based Customer Care staff team to answer operational questions and provide video guidance as needed.

6. Some providers have explicit data ownership, security and privacy policies while others offer verbal assurances only. Talk to each provider for more details.