newton
CONNECTIVITY SYSTEMS

CLIENT
EXPERIENCE
NEXT GENERATION

Introducing Client Experience Next Generation. Canada's most advanced mortgage application and document intake system. You can assist your clients in navigating the new application, with talking points that we have provided. These talking points can make your client feel comfortable with the experience.

CLIENT PROTECTION

What Is It?

Upgraded online experience designed to give clients additional comfort and trust in the protection of their personal data and documents.

Talking Points for Your Clients		
Secure Accounts	**Multi-Factor Authentication**	**Plain Language**
• We're protecting your information with a secure login • Save your application and come back to it at any time	• Ensure your data is secure by verifying your identity with texted codes or Google Authenticator	• Easily understand the process through plainly written language • The security, privacy and electronic signature policies are written in language that is easy to understand

BUILT FOR MOBILE

What Is It?

The online application can be fully completed through your mobile device. This includes the ability to upload documents through accessing the device's camera for capturing images of the requested documents for secure upload.

Talking Points for Your Clients	
Apply Anywhere	**Finish It Later**
• Access your application and submit information easily on your phone, tablet or computer	• If you don't finish the entire application on your phone in one sitting, easily come back to it on any device later

NATURAL INTEGRATIONS

What Is It?

Save your clients time and energy with optional integrations to securely transfer bank account statements and pre-fill addresses for subject properties, other properties owned and employment addresses.

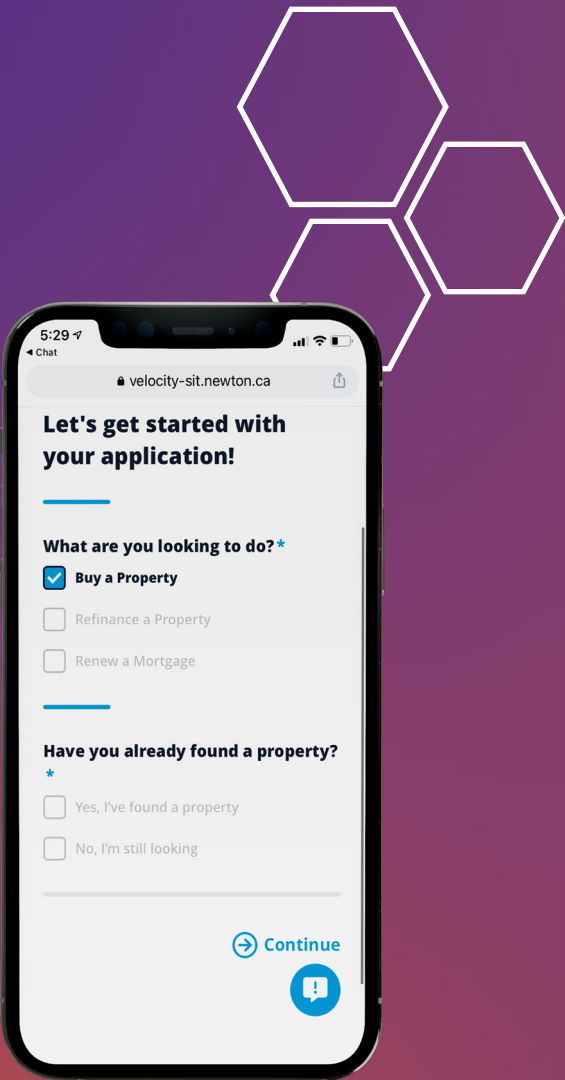| Talking Points for Your Client	
Pre-Fill	**EZ Account Access**
• We have made your application faster and easier with an address pre-fill service anywhere we ask for addresses • If you have ever shopped online before, you know exactly how it works!	• We have a new optional service for you to connect to your bank with one universal login and securely transfer the statements you choose along with your application • This will save you tracking down old statements or taking a trip to the bank, and all you have to do is pull out your ABM card and connect through the secure universal login provider • Your broker only receives the required statements to submit your application, and you keep your banking credentials private

INTUITIVE DOCUMENT REQUESTS

What Is It?

As clients complete the online application with information about their employment, income, application purpose and planned equity or down payment - Client Experience is building a personalized documents "to do" list from the applicants' entries. Everyone will automatically have a documents list and allow for fully complete application packages to be provided to lenders.

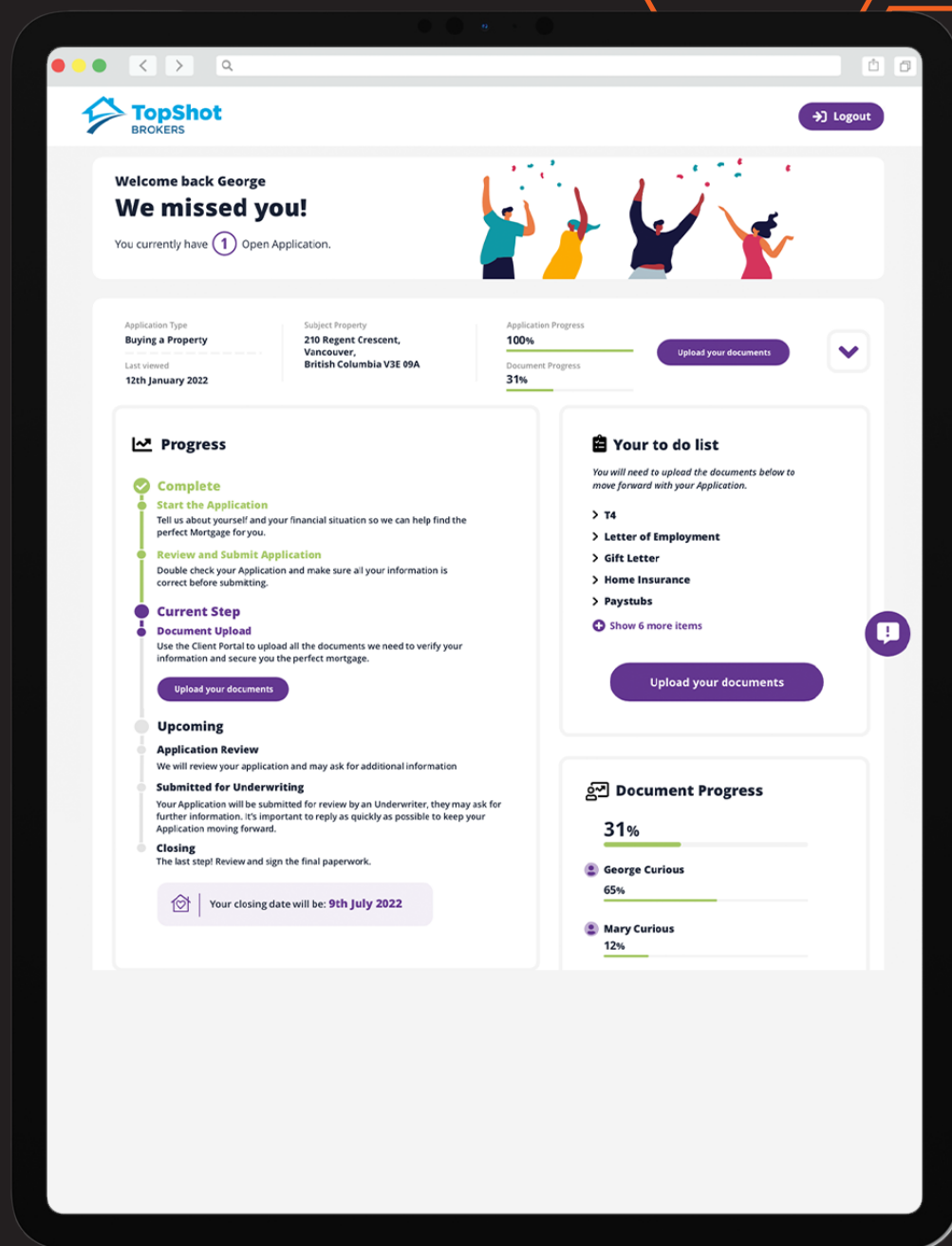| Talking Points for Your Client		
Faster Complete Applications	**Personalized Document List**	**Dashboard**
• Get ahead now instead of scrambling for documents later • Obtain condition free approvals faster by collecting critical documents sooner in the application process	• After submitting your application, you'll immediately receive an email with a personalized list of requested documents, as well as written confirmation of what you've consented to online	• Stay organized and track your application by returning to your dashboard at any time • Check which documents you still need to upload in the dashboard checklist

INTERACTIVE CLIENT DASHBOARD

What Is It?

The newest asset added with Client Experience - Next Generation is the Interactive Dashboard. This is designed to give clients 24/7 access to their application and documents progress throughout the entire process. Clients access their dashboard as their home page every time they login after the creation of their username and password.

Talking Points for Your Client	
Creat A Login	**Check In Anytime**
• Create a login at any time from the application screen on the top right-hand side where it says "save for later"	• Track your application progress anytime with an interactive dashboard • Easily check what you have left to do to complete your mortgage 24/7

Talking Points for Your Client

CLIENT PROTECTION

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• We have made your application faster and easier with an address pre-fill service anywhere we ask for addresses • If you have ever shopped online before, you know exactly how it works!	• We have a new optional service for you to connect to your bank with one universal login and securely transfer the statements you choose along with your application • This will save you tracking down old statements or taking a trip to the bank, and all you have to do is pull out your ABM card and connect through the secure universal login provider • Your broker only receives the required statements to submit your application, and you keep your banking credentials private

INTUITIVE DOCUMENT REQUESTS

Faster Complete Applications	Personalized Document List	Dashboard
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