



## DETAILS INCLUDE

You received your Agency Approval which is an important asset in today's market. Now what? The approval to sell, or securitize, directly to the government agencies (Fannie Mae, Freddie Mac, and Ginnie Mae) is a great first step in the maturity of any mortgage banker. These valuable approvals also come with a list of operational responsibilities required to execute, deliver, sell and service loans.

There are a number of business, workflow, and technology decisions that need to be discussed and decided upon before venturing into the selling direct world. We understand the challenges a mortgage company is facing when these approvals are received and in most cases these challenges are delaying the actual implementation of agency execution. Matchbox works with its clients to provide the insight and direction to effectively and efficiently deliver and/or securitize loan files via Fannie, Freddie, or Ginnie. We are able to break down those challenges and employ solutions that improve processes and increase profitability and margins.

We not only work with bankers on the strategies and solutions but also lead the implementation of technology integrations and custom programming.



Matchbox appreciates that every lender has a unique workflow and secondary strategy so a tailored solution is critical. The implementation process can be overwhelming. We make it easy and work with you to ensure a smooth transition. Eliminate your learning curve!

- Updating of the Product and Pricing Engine to appropriately include Agency offerings
- Execution strategy for pricing and commitments implementing new products and possible marketing campaigns
- Cash flow modeling to determine accurate MSR treatment and impact of servicing advances
- Creation of a set of proprietary products
- Development of company specific overlays and how these will be interpreted and integrated into LOS
- LOS ULDD and Early Check coding and business rules, streamlining data requirements
- Sub Servicer implementation, setting strategy and leveraging offerings
- Sub Servicer boarding technology process with coding and business rules, streamlining data requirements
- MSR management, forecasts and strategy
- Interim servicing policies and procedures
- Data integrity and reporting review for agency delivery
- Accounting process for retaining servicing

### AGENCY APPROVAL

Igniting ideas for the mortgage industry.

**matchbox**  
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