think smart
borrow smart

Borrow Smart Analysis

The SOFTWARE for Liability Management

SMALL BUSINESS / BRANCH EDITION

the Software –

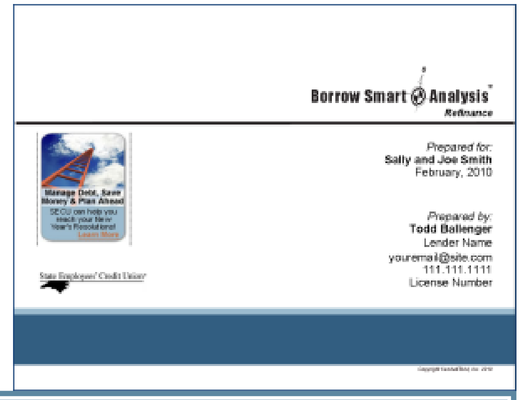
An industry changing approach to providing a fast, easy, accurate way for a client to understand the value of your company's advice when they buy, sell, or refinance their house. It's built the way people think, allowing your team to engage quickly. Interview with simple questions and our powerful advice engine provides customizable options. Behind the scenes a proprietary amortization engine runs up to four loan comparisons side-by-side. Dynamic sliders keep the user focused on comparing what's important to the client. Once a recommendation is ready, it's 'what you see is what you get' as the dynamic report engine generates a custom presentation using only the information selected during the analysis. Our patented product templates provide your team with a truly unfair advantage in your market.

the System –

Not just software, a patented 3-Step process [Interview, Analyze and Present]. Use a time tested step-by-step system for creating a highly visible, unmistakably valuable solution for your clients. The customizable interview form, the software, and the presentation engine all work together to create a unique client experience.

the Guarantee –

Your team will receive a 21-Day QuickStart training program to guarantee they understand how this transformational tool works for them. Every day they'll receive an email with tips, videos, and case studies that develop their skills. They'll identify compelling solutions for clients as they learn to answer the three most important questions for any borrower: what's my cost today?, what's the impact to my cash flow?, what's the impact to my wealth over time? Answer these questions and you'll quickly turn a prospect into a client for life. Complete the 21-Day QuickStart training, and if our program isn't a custom fit for your team, we'll refund your investment in full.



What's Included?

Software: Borrow Smart™ Software System - a complete liability management software tool for interactive client analysis and presentations, ongoing client management, and business development.

Training: Video based training program provides a 21-day habit forming engagement, with step-by-step instructions, examples, and 7 Practice Case Studies.

Content: Specialized content is built into the system, providing dynamic support 'on demand' as the plan is created. Additional content can be created and uploaded to provide additional tailored media.

Control: Executive login provides secure system wide controls over: logos, color schemes, disclosures, users, report language, report graphics, available user content, user access, and real time usage.

Investment:

$997 one time customization fee.
$27 per user monthly licensing and support fee.
(or $300 annual license fee per user).

Minimum 10 users.

Additional licenses may be added at any time.

Custom content creation and software modifications are available upon request to allow you to create your own Private Label solution.