LoanManagement

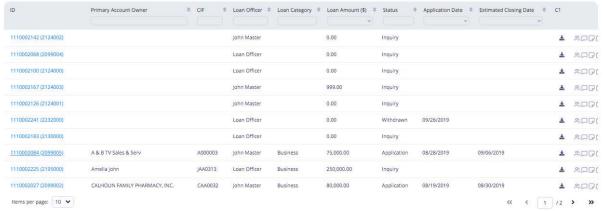## LM1 integration with JHA jXchange™

❖ **SilverLake System®**
❖ **Synergy Document Management™**
❖ **Synapsys®**
❖ **Ability to expand**

LM1 has been designed from the ground up to work with your Jack Henry systems to speed the process, reduce redundant entry, and eliminate errors that result from re-keying information.

- Create new customer accounts in Jack Henry Silverlake® Core Banking System.
- Retrieve customer and account information from your JSilverlake® System. This information, assets, and liabilities data is automatically populated into the system and used for processing and underwriting anaylsis.
- Create and update sales events in your Jack Henry Synapsys® Customer Relationship Management (CRM) system, so everyone in the bank has visibility to the loan in process.
- LM1 Creates a list of required documents for each loan based on bank policy. Retrieve existing relevant documents from your Jack Henry Synergy® Enterprise Content Management System. When the loan is closed, LM1 automatically files documents into Synergy®.

Whitestein is a member of the JHA Vendor Integration Program

All Applications   Hide Dashboard   Load Settings   Save Settings   Filter   New Loan Application

Processing ($100.00): 8.3 %
Application ($155,000.00): 16.7 %
Inquiry ($559,221.00): 75 %

MTD
Loans   Amount
1         $75,000.00

YTD
Loans   Amount
2         $155,000.00

ID	Primary Account Owner	CIF	Loan Officer	Loan Category	Loan Amount ($)	Status	Application Date	Estimated Closing Date	C1
1110002142 (2124002)			John Master		0.00	Inquiry			
1110002068 (2099004)			Loan Officer		0.00	Inquiry			
1110002100 (2124000)			Loan Officer		0.00	Inquiry			
1110002167 (2124003)			John Master		999.00	Inquiry			
1110002126 (2124001)			John Master		0.00	Inquiry			
1110002241 (2232000)			Loan Officer		0.00	Withdrawn	09/26/2019		
1110002183 (2130000)			Loan Officer		0.00	Inquiry			
1110002084 (2099005)	A & B TV Sales & Serv	A000003	John Master	Business	75,000.00	Application	08/28/2019	09/06/2019	
1110002225 (2195000)	Amelia John	JAA0313	Loan Officer	Business	250,000.00	Inquiry			
1110002027 (2099002)	CALHOUN FAMILY PHARMACY, INC.	CAA0032	John Master	Business	80,000.00	Application	08/19/2019	08/30/2019	

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About LM1:

- **Comprehensive:** LM1 automates the entire app-to-close cycle from initial inquiry to post-closing. Loan Officers, Processors, Underwriters, Credit Analysts, Closers, and Post-Closers are all enabled. Vital information is right here, not locked away in information silos.
- **Modern & Reliable:** LM1 is built on Living Systems Process Suite, an industry recognized, truly intelligent process automation platform. Technology that powers some of the largest financial organizations in the world is now available to regional and community banks for loan management.
- **Intuitive:** Commercial lending is a complex process driven by rules, risks and relationships. LM1 manages loans the way bankers manage loans, and supports the real process without becoming a drag on operations. Your loan operations team will find it refreshing, focusing their professional energy on their customers and loans instead of on how to make their systems do what they need.