

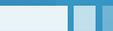
doxim[®]

TRANSFORMING CUSTOMER EXPERIENCE



Doxim Loan Origination

An Integrated Solution for
Retail & Commercial Lending

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DOXIM LOAN ORIGINATION: Lending Made Easy



"All the features we need are present in Doxim Loan Origination. Unlike our former system, we don't have to restart the Doxim application when we want to make some changes to the original input. We find that Doxim Loan Origination is sleek, efficient and very user friendly, even though it has complex work to do. All in all, it's an excellent product from every perspective."

Bob Watson, CEO,
PenFinancial Credit Union

Doxim Loan Origination solution provides an integrated, configurable lending solution for all your needs. Retail or commercial, all loan applications are handled through the same streamlined interface, to help meet the needs of your entire customer base and improve productivity and compliance.

BENEFITS FOR YOUR FINANCIAL INSTITUTION

Increases regulatory compliance through a fully automated loan application process that ensures no steps are missed while every loan is handled in a consistent, auditable, and compliant manner.

Streamlines lending with a natural, conversational application process, loan decisioning support, and automatic document generation, so your lenders can focus on building relationships rather than paperwork.

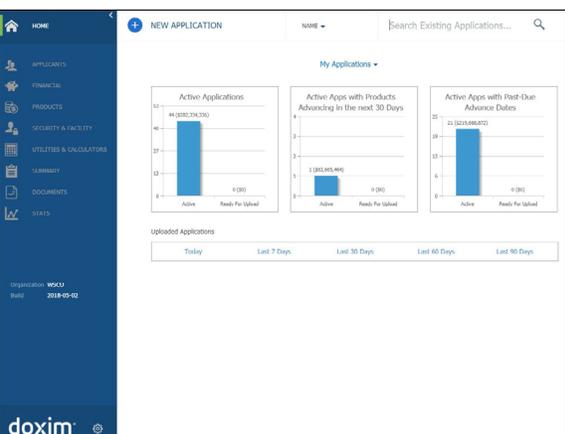
Enhances the customer experience by mobilizing your lenders, and accelerating fulfillment through e-signatures and automated approvals, resulting in lower abandonment rates.

Reduces error rates by pulling information from multiple internal and external sources to reduce error-prone manual data entry.

Mitigates risk by ensuring credit policies, loan approval criteria and pricing guidelines are applied consistently across the organization.

Cuts costs by eliminating aspects of loan processing like printing, manual data entry, and error correction.

Eliminates back-office workload through a robust portfolio of 3rd party integrations.



“To have a tool like Doxim Loan Origination that is quick and easy to use is fantastic – I can put through a very high volume of loans efficiently, with the peace of mind that comes from knowing error rates will be low.”

Jessica Struck, Account Manager,
TCU Financial Group

The Right Decision Every Time

Promote a consistent application of credit policy across multiple locations and delivery channels with the automated decision engine. It uses a customizable risk-based lending matrix that assesses loans and offers your staff a pass or fail loan funding recommendation. With automated loan decisioning in place, less time is spent on evaluating simple applications, enabling lenders to focus greater attention on more complex loan applicants.

Wow Your Customers with Mobile, Paperless Lending

Digital lending is a great way to improve your customer experience. Lenders can meet customers anywhere at their convenience with our new mobile-friendly user interface and e-Signature capabilities. Using the web-based questionnaire they can fulfill a loan at a customer’s home or place of business without ever having to handle or store paper.

Understand Customer Finances

Give your lenders a unique holistic view of the consumer’s or business’s financial assets and liabilities with the click of a button. With Doxim Loan Origination, they can make sophisticated lending decisions on retail and commercial loan applications based on a complete understanding of the borrower’s financial health.

One Simple Application Process, Multiple Loans

Umbrella loan support increases wallet share while reducing costs by processing multiple connected loans within a single application and securing them with common collateral.

Use Pre-Populated Forms for Faster Loans

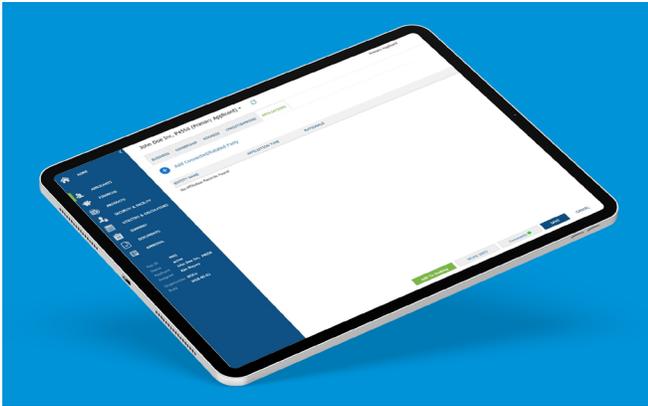
Easily pull the latest customer information including asset and liability figures from your banking system to pre-fill loan applications, allowing for faster, error-free processing.

Market-Leading Solution, Predictable Monthly Pricing

Eliminate the need to build and maintain costly in-house servers with our new SaaS solution. Instead, leave the burden of maintaining your loan origination application in the hands of Doxim’s experts, and take advantage of our secure, reliable and highly-available hosted services at a predictable price.

Integrated & Configurable Solution

Streamline lending processes with distinct configurations for retail and commercial loan products, user-friendly commenting capabilities, and flexible deal securing options.



Project How Changes to Loan Criteria Will Impact Your Bottom Line

The automated decision engine has a unique feature that allows banks and credit unions to evaluate the effect of changes to the decision grid by running them against historic loan decisions. Management can clearly see the impact changes will have on revenue and adjust parameters prior to ever going live.

Never Miss Another Opportunity

As the only loan origination system that integrates directly into a CRM, lenders can easily document future lending needs uncovered during customer loan processing. Management can rest assured that a revenue generating opportunity will never be lost with the integration to Doxim CRM.

Easy Payment Calculation

Facilitate payment calculations with or without insurance and allow staff to tweak loan parameters and review results with the payment calculator. Lenders can quickly show customers their monthly amount owed so that an adequate repayments schedule can be determined.

Improve Document Template Management

Manage and update document templates in-house for quicker turnaround times and reduced professional services costs.

Offer Consistent, Member-Friendly Pricing

Pricing policies will always be applied consistently throughout your bank and credit union. Doxim Loan Origination makes it simple to give each member the right discounts based on the unique pricing matrix provided to staff.

See Doxim Loan Origination in Action!

Book a personalized demo and see how Doxim Loan Origination can help you process more loans faster while minimizing costly errors.

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Doxim is a leading provider of SaaS-based customer communications and engagement software for banks, credit unions, and wealth management firms. Doxim's Customer Engagement Platform helps financial institutions transform their client experience, communicate effectively throughout the client lifecycle and improve cross-sell and upsell activities that drive increased wallet share. The platform addresses key digitization challenges, from automated account opening, through improved, personalized communications to anytime, anywhere content access, tailored to a client's channel preferences. This eliminates costly traditional paper-based, manual processes and enables cost-effective provision of an omni-channel experience that delights customers and improves their long-term loyalty. Find out more at www.doxim.com.

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