



REVOLUTIONIZING MORTGAGE TECHNOLOGY

Digital Mortgage Solutions for the **Modern Era**

www.WebMaxCo.com

THE PIVOT

Predicting borrower readiness by fusing credit trends, income signals, rate sensitivity, shopping behavior, and CRM/LOS activity into a single **Intent & Ability Score**.



Why This Matters

CRM-agnostic



Seamlessly integrates with any CRM platform.

Predictive scoring with 20–300% lift



Significant boost in conversion and efficiency.

Next Best Action guidance



Intelligent recommendations for optimal steps.

Learns from real funded-loan outcomes



Continuously refines models based on actual results.

Products

ReLax – AI Realtor-LO Relationship Engine

Fosters strong connections between Realtors and Loan Officers through intelligent AI.



WatchFile – Borrower Workflow Automation, Trigger & Re-engagement Engine

Automates borrower workflows, triggers actions, and drives re-engagement efficiency.



Market Problem

Key Challenges

-  Lack of insight into customer activity
-  Poor follow-up on past clients
-  Manual marketing is slow and inconsistent
-  Missed repeat/referral business opportunities
-  No centralized engagement strategy

Detailed Pain Points

-  **Lack of Reciprocity:** Lenders often send leads to Realtors, rarely receiving referrals in return.
-  **Limited Differentiation:** Most Lenders offer similar products and services making it hard to stand out.
-  **Slow Lead Flow:** Lenders rely on Realtors to send clients their way which creates dependency and delays.
-  **Disconnected Online Presence:** Realtors dominate digital engagement while Lenders are sidelined.
-  **Poor Communication Channels:** Fragmented workflows reduce collaboration and client follow-up.
-  **High Cost of Relationship Building:** Dinners, events, and gifts are expensive with uncertain ROI.

Solution

Lenders



Realtors



Borrowers



Unified automation + predictive intelligence
across lenders, Realtors, and borrowers.

Pivot Momentum



Traction





Distribution

Reseller partners actively reselling WebMax products:



Shape Software



Relcu

Business Model



Financial Strategy



Raise:

\$2M-\$4M



AI + Data
Science



Integrations



Sales & Partner
Enablement

Use of Funds Allocation

Based on strategic growth priorities:



50% – Engineering & AI Development

- Predictive scoring models
- Automation workflows
- Data science & infrastructure



30% – Product Integrations & Platform Expansion

- CRM/LOS integrations
- Realtor-LO collaboration tools
- Borrower journey automation



20% – Sales, Partnerships & GTM

- CRM reseller enablement
- Partner activation
- Sales expansion



Exit Strategy



Primary Acquirers

Mortgage CRMs
(Shape, Relcu)



Secondary

Insurance, PropTech
ecosystems



Why

Acquire predictive
intelligence +
automation layer.

MEET OUR TEAM

YOUR STRATEGIC SUCCESS PARTNERS



WebMax
DIGITAL MORTGAGE SOLUTIONS



**CURT
TEGELER**

Chief Executive
Officer



**KELCEY T.
BROWN**

Chief Operating
Officer



**ATHUL
MOHAN**

Chief Strategy
Officer



**ALEXEY
YEGOROV**

Chief Technology
Officer

The Leadership Team includes our **co-founders** with extensive experience in **technology, sales**, and the **mortgage**, as well as industry's best Developers adept at creating **scalable SaaS** solutions.

To support our growth, growth, we plan to **hire sales representatives and marketing specialists**, as expand our

JOIN THE JOURNEY

CALL TO ACTION



INVESTMENT OPPORTUNITY

- Join us in **revolutionizing** mortgage technology solutions!
- Be part of a scalable **SaaS** solution with **high growth potential!**



www.WebMaxCo.com



CONTACT

Curt Tegeler

■ p. **856.702.6402**
■ e. **Curt@WebMaxCo.com**

WebMax Digital Mortgage
Solutions:
■ p. **609.332.8762**