

PERSONAL FINANCIAL TRANSITION

Start

Information Gathering:

Personal Information:
(Initial Short Form Application)
Credit Authorization, FCRA Disclosures

Collection of Personal Info
Credit Report Pulled
Debt & Income Analysis
Comparison of Info V. Desired Outcomes

Comparison of Financing Options Available
Qualifications V. Loan Parameters
Options Available in Transition*
(*Current Property Resolution Included.)

Personal Financial Transition Recommendation

A 360° Report is Generated with a "Go
Forward Plan"

Finalize Solution
Based on BEST Result
for Clients

End Process