

HOW WE HELP YOU

WIN

**BEFORE, DURING,
& AFTER YOUR
TRANSACTION**



powered by **Better**

The **NEW Approach to Your Mortgage**



Better Mortgage Corporation NMLS #330511. Equal Housing Lender. www.nmlsconsumeraccess.org

BEFORE BUYING | Clarity & Confidence

As a partner to you, NEO Home Loans ensures you are well-prepared and confident from the very beginning.

01 

Dreams & Goals Phone Call

Before we truly begin, we want to have a call to help bring focus into the buying process, and discuss your long-term personal and financial goals.

02 

Pre-Purchase Consultation

Education is powerful. We'll discuss the buying process and your readiness to purchase. We'll provide a Mortgage Options Report to simplify choosing the perfect mortgage. At NEO, we take you from "I'm not sure" to "I'm ready." While most lenders show you what you CAN do, we help you realize what you SHOULD do and what you MUST do to achieve your homeownership goals.

03 

Bullet Proof Buyer Program

Want to improve your offer acceptance rate? We provide stronger offers with Fully Underwritten Pre-Approved Buyers because we know that confident and educated buyers write strong offers. With Appraisal Gap coverage and increased confidence, you can write strong offers with little to no contingencies.

04 

Pre-Offer Call (Offer Acceptance Strategy)

At NEO, we believe in collaborating strategically with you and all parties involved to maximize the effectiveness of each offer.

05 

Digital Offer Delivered

Once the offer is sent, we'll communicate directly with the listing agent to highlight the strengths of your client's offer to truly make them stand out.

Together, we'll prepare you for a successful and informed home buying experience.



DURING | Execution & Stress-Free Approval

NEO streamlines the approval process, ensuring you experience a smooth transition from offer to closing.

01 >>

Contract Meeting

As with most things in mortgage, we start with an in person/virtual meeting. Here we'll lock in all mortgage details and kickstart the final approval process, keeping timelines tight. You will meet a team of experts who are great at their role. We will pay close attention to every detail to ensure a smooth process.

02 >>

Proactive Communication System

At NEO, we believe that the more information you have, the better. Our commitment to over-communication guarantees that you are always informed.

03 >>

Weekly Status Update Phone Call

With weekly phone calls to you, the buyers agent, and the listing agent, we ensure a smooth approval process and closing. No need to call us, we proactively call YOU!

04 >>

Home Binder Assist & NEO Experience App

We'll get you signed up for our two favorite resources: Home Binder Assist, our concierge service for all things relocation, and our NEO Experience App. These tools will help you keep all home-related documents and tasks neatly organized and accessible.

**We handle the complexities of the mortgage process,
so you can focus on making your new home your own.**



AFTER CLOSING | Our Lifetime Commitment Begins

If you thought we were helpful for the last 30 days, they are going to blow away with how valuable we'll be for the next 30 years.

01 >>

Transitioning to Homeownership

The first step after closing is a thorough call to ensure you feel secure and informed as you transition into being a homeowner. We address any immediate questions and set the stage for your long-term success.



Meet Your Client Success Manager, Liz Moore

Your CSM will be the ongoing point of contact, providing personalized attention and support. They'll ensure that your clients' post-closing experience is seamless and satisfactory.

03 >>

Scheduled Touchpoints

- **Post-Closing Call:** To ensure smooth financial transitions and payment setups.
- **90-Day Call:** To ensure you understand the next steps to becoming a well-rounded, successful homeowner.
- **6-Month Check-In Call:** To address any homeowner questions, provide useful tips for homeownership, and to remind you that our Perfect Mortgage Promise is in place.
- **Annual Financial Review:** We review financial performance and discuss potential next steps in their investment journey, but most importantly, we help make sure you are setting and working towards their future real estate and wealth-building goals.

04 >>

Perfect Mortgage Promise

We continuously monitor the mortgage landscape to ensure that your loan remains the best fit for your financial situation, potentially saving you money and optimizing your investment.

AFTER CLOSING | Continued

05 >>

Leverage the Local "Wealth Creation Team"

Did you know you have access to expert advice whenever you need it? Connect with our curated team of local experts in real estate, insurance, financial planning, legal, and banking. This team is designed to assist you with all aspects of wealth creation and management post-purchase.

06 >>

Monthly Real Estate Wealth Digest

Through our monthly home equity report and the NEO Experience App, we provide you with ongoing insights, tips, and relevant updates to help manage and enhance the value of your new home.

07 >>

Home Binder

Staying organized from the beginning of homeownership is a great way to feel reassured. Our Home Binder tool helps you keep track of maintenance schedules, appliance warranties, and important household documents, all in one accessible online location.

08 >>

Beyond the Sale

At NEO, our commitment to you extends far beyond the close. We are here to support, guide, and assist you in every way possible, ensuring you not only become a homeowner but a successful, confident one. For life.

READY TO GET STARTED? GET IN TOUCH!



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