

Freedom Mortgage Addendum to the Encompass Investor Connect Lender User's Guide

Complete the following steps to successfully deliver loan packages to Freedom Mortgage through Encompass Investor Connect.

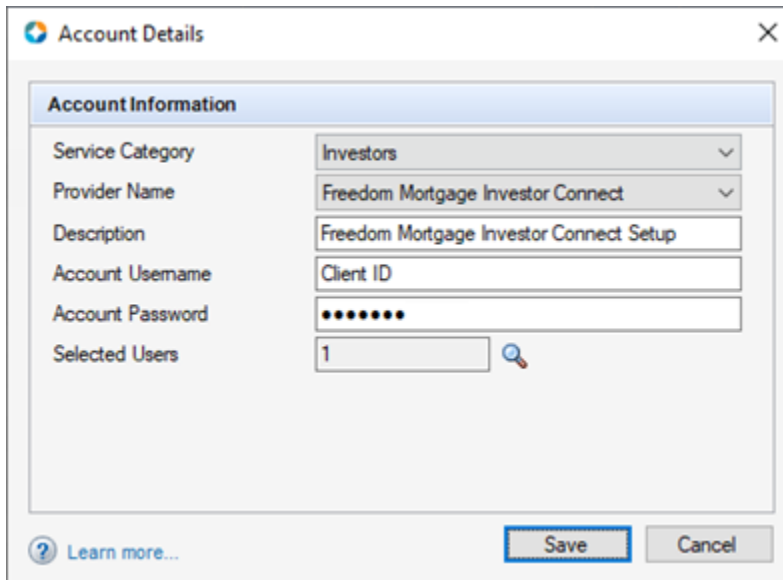
IMPORTANT: Use Encompass Investor Connect to deliver loans to Freedom Mortgage only for closed loan delivery.

Configuring Your Investor Connect Setup

Your administrator needs to complete the following steps when configuring Encompass Investor Connect in the Encompass settings.

Services Password Management

Your Encompass administrator must follow these guidelines when creating the Account Details entry for Freedom Mortgage in the Services Password Management setting (**Encompass > Settings > Company/User Setup > Services Password Management**):



Account Information	
Service Category	Investors
Provider Name	Freedom Mortgage Investor Connect
Description	Freedom Mortgage Investor Connect Setup
Account Username	Client ID
Account Password	*****
Selected Users	1

1. Enter your company's Client ID number in the Account Username field. If you do not have a Client ID number, contact your Freedom Sales Associate for help.

Note: Please do not enter anything other than the 4-digit or 5-digit code.

2. Enter **freedom** in the Account Password field.

Submitting Data and Document Packages

Encompass users must follow these guidelines when submitting data and document packages:

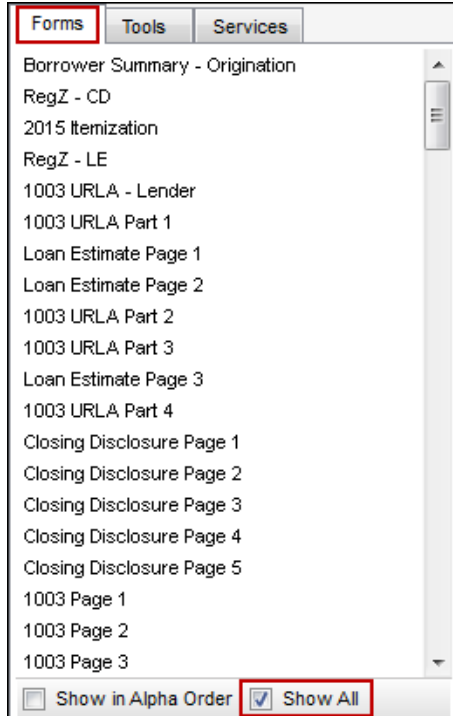
- On the Add Submission Details section of the Deliver Loans window:
 - Make sure **Closed File Image Delivery** is selected from the **Submission Type** drop-down list.
 - Select a **Stacking Template** from the drop-down list.

Investor “Freedom” Loan Number

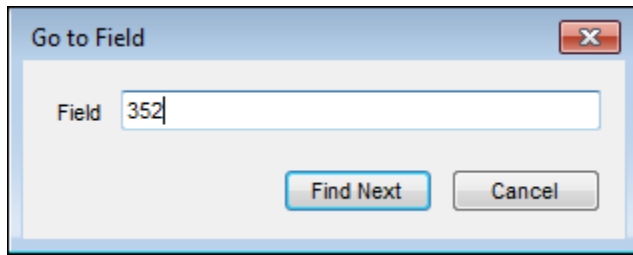
For a smooth delivery of loan packages, Freedom Mortgage uses the Encompass Loan Number, Investor Loan Number, Universal Loan Identifier, Primary Borrower Last Name and Subject Property Address from the loan file submitted through Encompass Investor Connect to match the loan in Freedom Mortgage’s system. While not required, providing the Freedom Mortgage Loan number will improve loan matching accuracy.

To Add the Freedom Mortgage Loan Number:

1. Open the loan file, click the **Forms** tab in the lower-left panel, and then select the **Show All** check box.



2. Press **Ctrl+G**.
3. Type **352** in the field and click **Find Next**.



4. This takes you to the Investor Loan Number field. Enter the Freedom Mortgage Loan Number in the field, and then save the loan.

Additional Information

To further avoid delays in processing with Freedom Mortgage and to help ensure that your loan package is successfully delivered after submission, please make sure that the primary borrower's last name is entered exactly as it was at the time the loan was locked.

NOTE: If you need to contact Freedom Mortgage about a specific loan submission, please provide the **Freedom Mortgage Loan Number** and **Loan Delivery Status** for the loan in question.