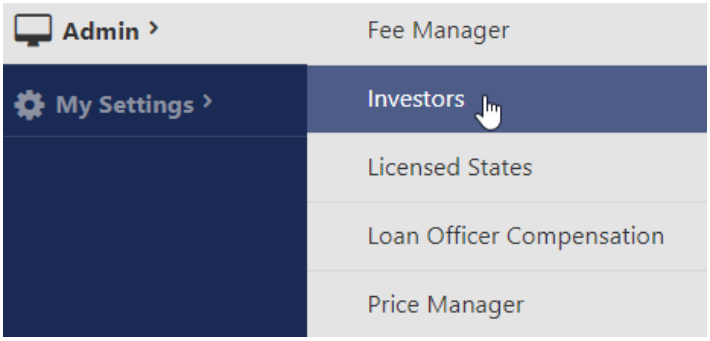
MANAGING INVESTOR CONTENT

The Investors page in Loansifter allows you to control the investor content that users see in your site. **Approved Investors** are those that have been approved by the brokerage for the NMLS ID associated with the account. Loansifter offers Wholesale, Non-Delegated, and Mini-Correspondent content.

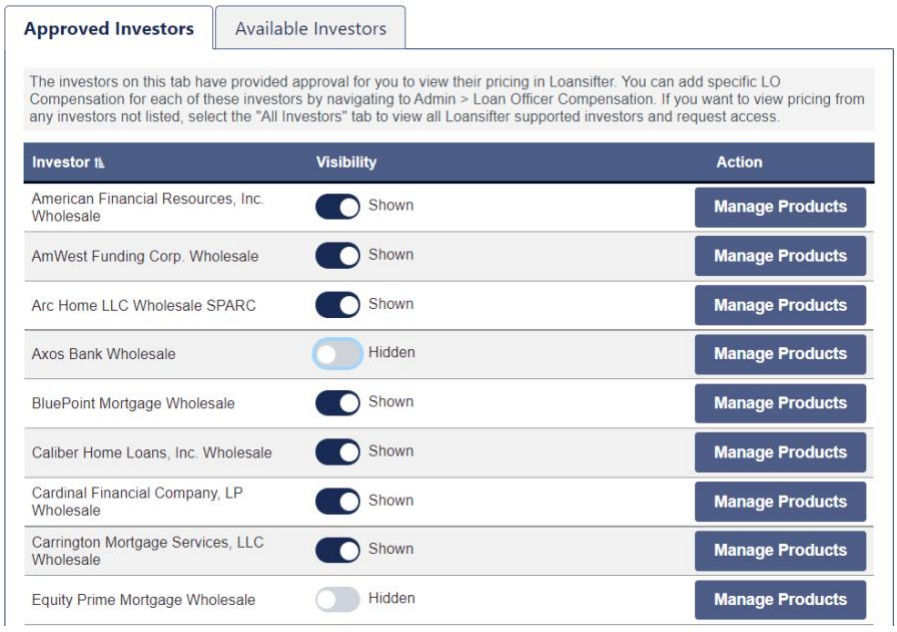
To access the Investors page, highlight the **Admin** option and select the **Investors** link.



TURNING INVESTORS ON/OFF

You can choose to hide or show any of the investors that you have access to from the **Approved Investors** tab. This process determines which investors will be available on the search page for all users with the same NMLS ID.

Hidden investors are not available for pricing or for LO compensation configuration.



PROMOTIONAL INVESTORS

Promotional investors are advertising a promotional rate to brokers. This service offers the opportunity to see investors outside of those you already work with if you are considering building more relationships in the marketplace.

Search results may include promotional investors which are indicated with a PROMO tag. Loansifter includes promotional investors by default. Users can exclude promotional investors from search results with the Investors dropdown in the Product Characteristics section of the New Search page.

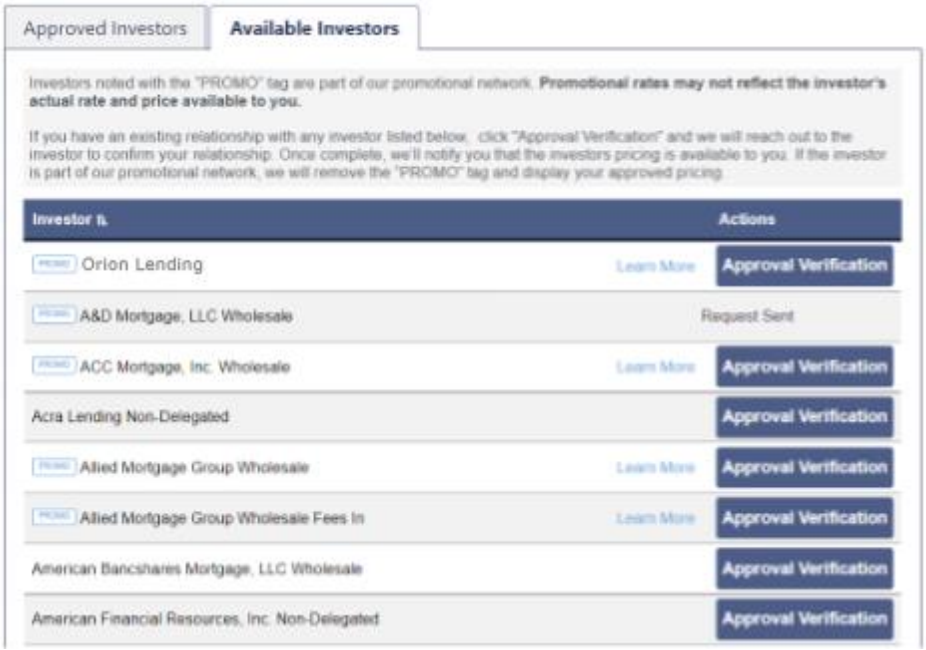
REQUESTING NEW INVESTORS

You can view the full list of available investors supported by Optimal Blue on the **Available Investors** tab. You can request access to any of those investors by selecting the **Approval Verification** button.

Optimal Blue will process the request and notify you by email when the investor is available.

In search results, selecting the PROMO icon will open a window where you can notify Optimal Blue you are approved with the investor. We will confirm then add them to your approved investors list.

The **Learn More** link will open a new browser window displaying the investor's site and promotion information where applicable.



All newly added investors will be hidden by default. You must activate them by changing their **Visibility** to **Shown** for the investor to return in search results.

Sample approval verification email:

