

## CANADIAN MORTGAGE TECHNOLOGY

# Fusion Exchange—A Secure Document Management Solution

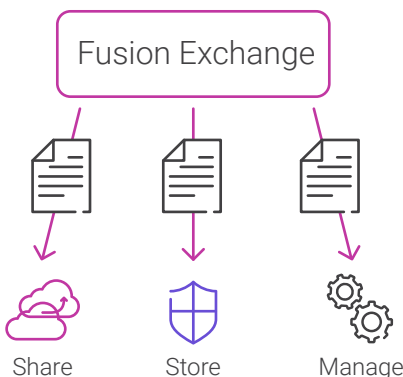
“From proof of employment, wages and identity through to the actual mortgage contract itself, all of the documents need to be shared, stored and managed beyond the life of a mortgage.”

A secure document management solution enabling lenders and mortgage brokers to securely share, store, and manage documents associated with the mortgage application process.

A lot of documentation is involved in processing mortgage applications. From proof of employment, wages and identity through to the actual mortgage contract itself, all of the documents need to be shared, stored and managed beyond the life of a mortgage. Fusion Exchange seamlessly integrates with Expert mortgage origination and Express mortgage underwriting solutions to maximize the efficiency gains associated with electronic document management while minimizing the additional effort, risk and cost inherent in maintaining a stand-alone solution.

### This feature-rich solution provides:

- **Integration with Expert and Express** for seamless and secure document transmission and collaboration between mortgage brokers and lenders.
- **Centralized, secure storage**—All of the documents associated with a mortgage transaction, regardless of size or file type, are kept in one central folder (the deal folder) for easy access, review, and maintenance by both brokers and underwriters.
- **Easy document upload and document export functionality**, with automated notifications when new documents are added.
- **A simple and intuitive user interface** that minimizes training requirements.



# Connecting Brokers and Lenders to Save Time and Increase Efficiency



Effortlessly connecting your document management solution to Fusion Expert, Finastra's mortgage origination system.



Enabling more efficient and secure electronic document sharing between lenders and mortgage brokers.



Saving time and money through a reduced reliance on offsite storage and retrieval of physical documentation.



Providing functionality specifically developed to support the requirements and nuances of the Canadian mortgage industry.



Facilitating audit and compliance requirements by easily ensuring required documentation is complete and on file and compliant with privacy protection standards.

## Why Finastra Canadian Mortgage Technology?

Our reputation as a trusted partner of efficient and accurate transaction processing in Canada's lending community is built on four key values:

- **Trusted** to deliver the right solutions that fit our clients' needs and make a meaningful contribution to their business results. Most Canadian Financial Institutions, specialty finance lenders and virtually all Canadian automotive finance organizations rely on us as their partner of choice.
- **Expertise**—Category leading expertise in the lending process and the most comprehensive lending suite available.
- **Solutions Oriented**—Our integrated, compliant, and client focused solutions enable our clients to grow, compete and optimize their operations.
- **Forward Thinking**—Anticipating changing market dynamics and providing relevant solutions that ensure our clients remain ahead of the curve.

## About Finastra

Finastra unlocks the potential of people and businesses in finance, creating a platform for open innovation. Formed in 2017 by the combination of Misys and D+H, we provide the broadest portfolio of financial services software in the world today – spanning retail banking, transaction banking, lending, and treasury and capital markets. Our solutions enable customers to deploy mission critical technology on premises or in the cloud. Our scale and geographical reach means that we can serve customers effectively, regardless of their size or geographic location – from global financial institutions, to community banks and credit unions. Through our open, secure and reliable solutions, customers are empowered to accelerate growth, optimize cost, mitigate risk and continually evolve to meet the changing needs of their customers. 48 of the world's top 50 banks use Finastra technology. Please visit [finastra.com](http://finastra.com)

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## North American headquarters

120 Bremner Boulevard  
30th Floor  
Toronto, Ontario M5J 0A8  
Canada  
T: +1 888 850 6656

