

CounselorMax[®]
www.counselormax.com

**We have homeownership
counselors covered.
Online.**

**Explore
new
features
inside**

NeighborWorks[®]
AMERICA

Working Together for
Strong Communities

Sign on. Bring big administrative tasks down to size.

Accessible from any computer with Internet access, anywhere and anytime, CounselorMax® frees you from many day-to-day activities. Complete with reminder prompts, its calendar function enables you to track your activities and those of your clients. In addition to being able to create classes, you'll manage enrollment and attendance online for individuals or groups, as well as create education certificates needed to qualify for down payment assistance or certain mortgage products. You'll also be able to generate outreach materials customized with your logo, in English or Spanish.



“Plenty of customizable fields so my agencies can track their data by grant, subsidies, special programs, etc.”

Take productivity to the Max. For minimal cost.

Whether being utilized for pre-purchase counseling and education or loss mitigation, CounselorMax® assists you every day and every step of the way. Intake, performed in real-time, becomes effortless. Credit reports are pre-populated with liabilities, and accessing scores is easier than ever. Creating and sharing action plans with clients is simple, too. You'll also be better able to respond to clients' concerns with convenient tools, such as a built-in amortization schedule. CounselorMax® can save you hours of time and trouble, so you can put every minute of yours to good use.

The industry's most comprehensive reporting tool, now even better.

For both content and accuracy, CounselorMax® sets the standard for quality reporting. Continuously updated to meet regulatory compliance and your clients' changing needs, CounselorMax® is the client management tool that homeownership counselors can rely on for the long haul. In addition to automatically generating the required HUD 9902 report, now all major industry reports are standard in the system, which greatly simplifies HUD, National Foreclosure Mitigation Counseling (NFMC) and NeighborWorks quarterly reporting. Complementing this is a customized reporting tool that is so sophisticated that it makes it simple to create a report using any combination of relevant data fields that is unique to your organization. And for intermediaries, the ReportMax feature allows you to aggregate data and report on the activity of your affiliates.

“We like the ease of enrolling clients into classes.”



More functionality = less work.

As part of its mission to serve the needs of the counseling industry, NeighborWorks has significantly enhanced CounselorMax® with these added capabilities:

- Loan modification packages, including a standard budget, can be transmitted electronically to the Hope LoanPort, an online portal for counselors and servicers to communicate with each other. Actions and communications are tracked so, for example, there is no concern that a fax was not received.
- Along with customizable weekly and monthly budget tools, you also have a choice of two standard budgets, for a total of three distinct budget options.
- A standard loan application (1003) can be exported from the system for use by such tools as lender loan origination systems.

- The Default Foreclosure Module tracks standard default and loss mitigation activity, and then reports using NFMC standards.
- Financial Progress Profile -- A tool to track and communicate client progress using quantifiable data to show funders and partners a return on their investment.
- For your convenience, a range of management and productivity reports are now automated at the click of your mouse, and you have added flexibility in tracking client counseling hours.

“It’s all there—view reminders, print reminder letters, view my calendar for the entire month, or develop a custom report for any funder.”

About CounselorMax

Among the most comprehensive systems of its kind, CounselorMax® is the user-friendly web-based application designed to help homeownership counselors:

- Create effective outreach campaigns quickly and easily
- Perform intake with minimal effort
- Maximize efficiency with powerful pre- and post-purchase counseling tools
- Save time scheduling and tracking
- Generate accurate and customized reports for funders and staff

Marketing and Outreach

- Draft letters, create fliers and more in English, Spanish or both
- Customize communications with your organization’s logo
- Schedule and send follow-up correspondence

Foreclosure Mitigation

- Electronically transmit loan modification packages to the Hope LoanPort
- Easily track standard default and loss mitigation activity (including type of loan, amount, outstanding balance and primary reason for default) through CounselorMax®’s Default Foreclosure Module’s customized guiding and planning work-flow system
- Meet the requirements for NFMC grantees and sub-grantees
- Effortlessly report default and loss mitigation activity using NFMC standards

Grantor and Investor Reporting

- Print and export all major industry reports (HUD, NFMC and NeighborWorks quarterly reporting)
- Automatically generate the required HUD 9902 report
- Create custom reports using any combination of relevant data fields in the database to tell individual stories
- Report the activity of affiliates and aggregate the appropriate information through ReportMax, its reporting feature

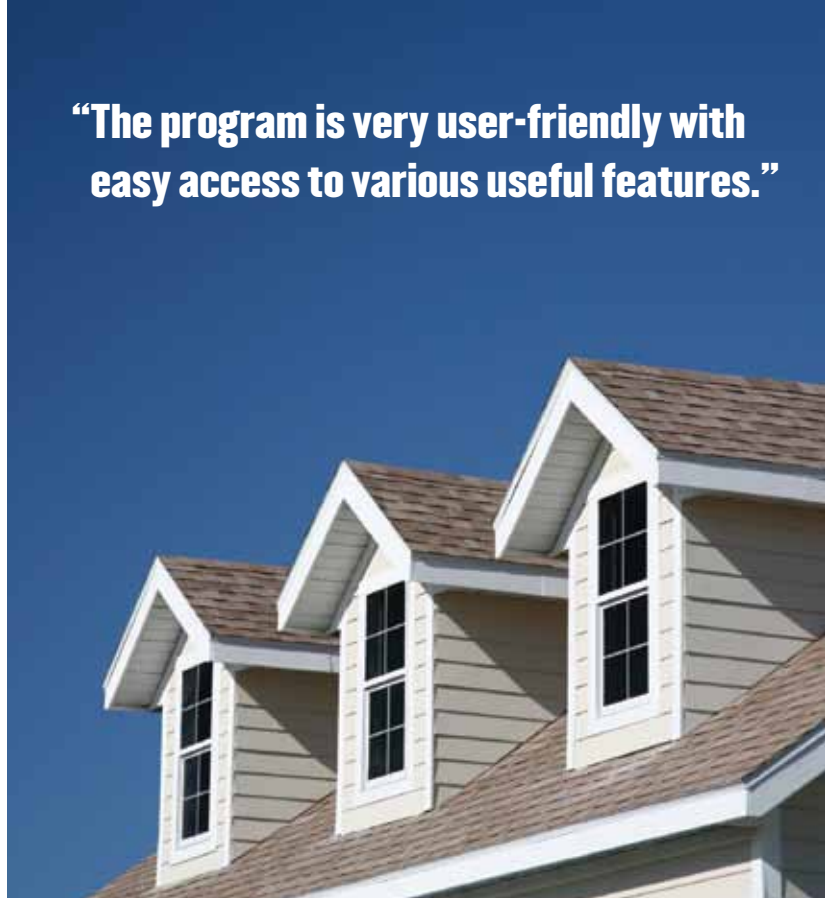
**Welcomingly user-friendly.
Highly secure.**

CounselorMax® may be long on features, but its learning curve is short. Intuitive and thoughtfully designed, most users feel at home with the system in no time. Should you ever need support, though, prompt technical assistance is never more than an e-mail or phone call away. You can also be confident that all information in the system is extremely secure.

Learn more. Do more.

With everything homeownership counselors are being asked to do, CounselorMax® is the answer you need to be more professional and effective in your position today, as well as help your clients to a brighter future through homeownership.

“The program is very user-friendly with easy access to various useful features.”



- Extract information at the organization or intermediary level
- Newly automated reporting and the Financial Progress Profile help you tell a compelling story to funders and partners

Education and Counseling

- Create classes for clients
- Manage enrollment and attendance for individuals or groups and create education certificates
- Develop standard or customized weekly and monthly budget tools for clients
- Create and share action plans with clients

Conveniences for the Counselor

- Accessible from any computer with Internet access, 24 hours a day, 7 days a week
- Calendar function, complete with reminder prompts, schedules counselor’s time and clients’ activities
- Newly flexible time tracking functionality ensures that all counseling time is captured

- Client intake activities are performed in real-time
- Multiple modes of counseling, including face-to-face, are tracked
- Credit reports, which are pre-populated with liabilities, and scores can be easily accessed
- Tri-merged soft credit reports, which prevent adverse impacts to your clients’ scores, are also available
- Tools such as the amortization schedule allow counselors to better answer clients’ questions and concerns
- The system is always maintained for regulatory compliance
- CounselorMax data is highly secure
- CounselorMax is continuously enhanced to address evolving customer needs and industry demands
- Exceptional support provided from a highly trained, dedicated team



**“Helps me keep track of
all of our services for our
customers’ records.”**

To homeownership counselors across the country, CounselorMax® is more than just a premier client management tool. It’s the web application built to take the busy work out of your workflow. The most comprehensive system of its kind, it virtually automates education services, scheduling, data collection and more. In just a few clicks, reporting becomes simply more accurate, easily more compelling. Now more advanced than ever, CounselorMax® enables you to more efficiently complete everything you need to do, so you can accomplish what you truly want to do—to make sustainable homeownership a reality for your clients.



“The 9902 is now the easiest report to do.”





Discover all the ways that CounselorMax® helps you to stay on top of everything. For more information or to sign up, contact us now at counselormax@nw.org.

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