



Features Comparison: CounselorMax® and NeighborWorks® Compass

Feature	CounselorMax	NeighborWorks Compass
Track counseling and counselor time and export to Outlook calendar	Yes	No
Receive reminder alerts	Yes	Yes
Pull tri-merged credit reports and auto populate	Yes	No
Estimate meetings through meeting calculator tool	Yes	No
View principal and interest over time through amortization schedule tool	Yes	No
Create a budget	Yes	No
Create an action plan	Yes	No
Compare loans	Yes	No
Store certificates of class completion	Yes	No
View customer financial progress reports - Individual and aggregate for the agency	Yes	No
Create financial progress goals, track progress and create graphs of progress	Yes	No
Schedule classes and courses	Yes	Yes
Create class rosters	Yes	Yes
Remind clients about appointments and classes	Yes	Yes

Manage the client pipeline	Yes	Yes
Manage documents and upload documents	Yes	Yes
Reach out to prospects (e.g., letters, flyers, etc.)	Yes	No
Create a loan application to export to loan origination software	Yes	No
Customize reports	Yes	Yes
Digitally transmit HUD 9902 report	Yes	Yes
Automate HUD 9902 AMI yearly change validations	Yes	No
Submit quarterly reports to NeighborWorks America	Yes	Yes
Create a customer Portal that's compatible with mobile devices	Yes	No
Provide client access to the customer portal, where they can upload documents, schedule classes perform intake and send messages	Yes	Yes
Set up two-way chat between client and counselor	Yes	No
Create and electronically send intermediary aggregating and report to HUD	Yes	No
Push updates to instances without customers needing to configure on their own	Yes	No
Customize disaster tracking module	Yes	No
Identify clients assisted through the Housing Stability Counseling Program (HSCP)	Yes	Yes
Train live users and create national or regional reports	Yes	No
Offer webinar trainings	Yes	Yes
Set up user focus groups	Yes	No