



- Optimizing Your Educational Compliance to Save Time and \$\$\$

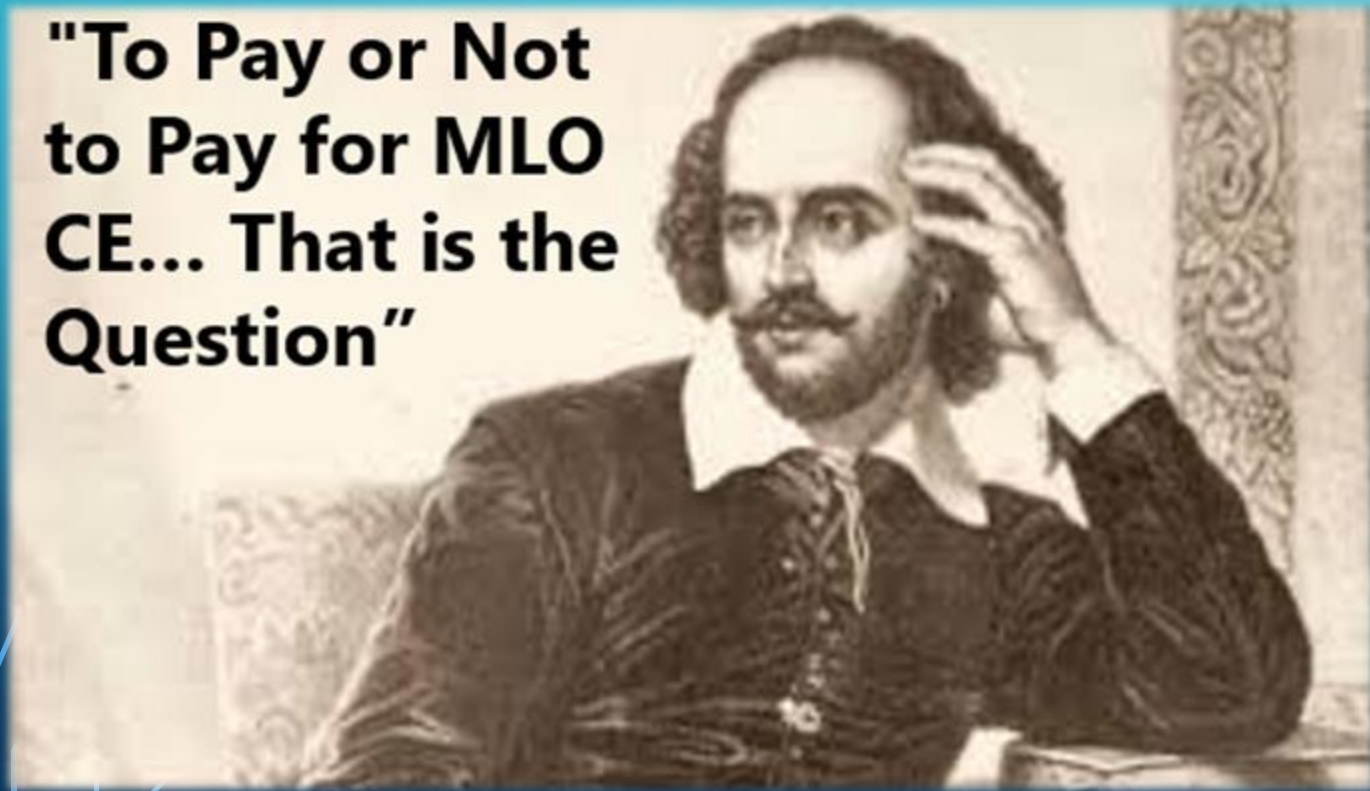




SAVE MONEY and GUARANTEE COMPLIANCE

- Streamline Compliance
- Save Loan Officers 5 hrs of Redundant Training
- Save money: MLO Cost-Participation in CE
- MLOs write more LOANS

**"To Pay or Not
to Pay for MLO
CE... That is the
Question"**



*No Longer a Binary Question...
Cost-Participation as a Win-Win For All*



optimize

COMPLIANCE SOLUTIONS



1 min Solutions Video

Why Partner With Optimize?

Welcome to Optimize Compliance Solutions, the first and only true collaborative partner for compliance and hiring managers in mortgage lending.

Optimize sprouted from a culture and history of satisfying client needs through our affiliated company, MortgageEducation.com. Over the last 15 years, lenders continually asked us to eliminate pain points and wasted time, to reduce department expenditure, to strengthen compliance and to enable their MLOs. We responded with innovative solutions. Again, and again.

Client needs and input drove every innovation in our SaaS platform, our suite of products and our service standard. We want you to benefit from that joint venture.



1 min Testimonial Highlights Video



Recognize
your peers?





ELIMINATE REDUNDANT TRAINING WITH CROSS-CERTIFIED MODULES

MLO Cost Participation to SAVE 5 Hours

Corporate Launches Mandatory Compliance Modules

5h MLO Corporate Compliance

MLOs Convert 5 hours of accrued training to CE

Fair Lending

AML

Fraud



7 Additional Modules

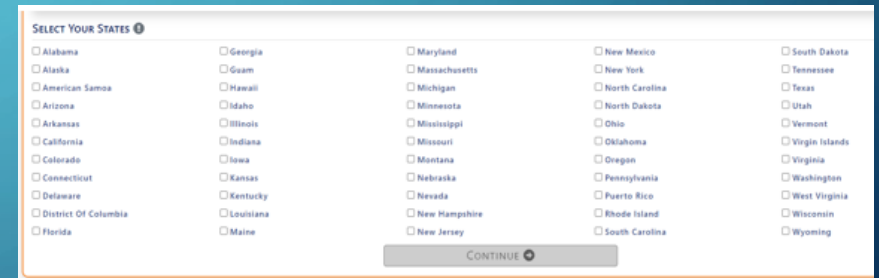


RESPA
ECOA
HMDA
UDAAP
GLB/Privacy
Trid
FCRA

Remaining Federal Hours Auto-Added



MLOs Choose their States



All Corp Compliance and NMLS CE Completed

AUDIT CENTER: READY FOR AUDITOR INQUIRIES

All documentation
one place

The screenshot shows the 'AUDIT CENTER' interface for 'DEMONSTRATION MORTGAGE CORP'. It features a navigation sidebar on the left with icons for Progress, Assignments, Employees, Branches, Notification, Audit Center, Activity, and Reports. The main content area has tabs for Documents, Certificates, and Reports. Under the Documents tab, there are five document cards:

- Course Content 2023 mComply Modules** (Feb 9, 2023 3:28 PM, 0 views, 356 downloads) - Disabled
- Attorney Review Letter Course Modules 2023** (Feb 9, 2023 3:26 PM, 0 views, 356 downloads) - Disabled
- 2023 Training and Execution Plan** (Feb 9, 2023 3:26 PM, 0 views, 356 downloads) - Disabled
- Training Modules Sysopsis 2023** (Feb 9, 2023 3:23 PM, 0 views, 356 downloads) - Disabled
- Example Policy Document (1)** (Feb 1, 2023 3:03 PM, 2 views, 354 downloads) - Enabled

Buttons for 'FILTERS' and 'UPLOAD NEW DOCUMENT' are visible in the top right of the document list.

BULK CERTIFICATE PRINTING

This screenshot shows the 'AUDIT CENTER' interface for 'DEMONSTRATION MORTGAGE CORP' in the 'Certificates' tab. The 'Year' is set to 2021. On the left, a list of courses is shown, with 'MORTGAGECOMPLY' highlighted in a red box. A '101 certificates available' notification is present. In the center, a list of 28 employees is selected, with the entire list highlighted in a red box. On the right, a 'COLLATE BY' dropdown is set to 'COURSE'. At the bottom right, a 'PRINT (78 CERTIFICATES)' button is highlighted in a red box, with two red arrows pointing to it from the right side of the interface.



EMAIL NOTIFICATIONS:

Notify students with incomplete courses to **COMPLETE THEIR TRAINING** with customized emails

EMAIL NOTIFICATION - DEMO#202302090418

NOTIFICATION TYPE

- GENERAL
- COURSE REMINDER**
- DOCUMENTS

SELECT GROUP

COURSE STATUS

- With Courses**
- With Incomplete Courses
- With all Courses Completed

COURSES ASSIGNED AFTER: 01/01/2021

ADDITIONAL SELECTORS

SELECT SPECIFIC COURSES

SELECT EMPLOYEE

SELECT ALL

Search Employee

37, 5, 32

Filters

- AaDemo000 AStudent000
- AaDemo001 AStudent001
- AaDemo002 AStudent002
- AaDemo0031 AStudent003
- Ademo376 Student376
- Ademo377 Student377
- Ademo378 Student378
- Ademo380 Student380
- Ademo950 Student950
- Ademo951 Student951
- Demo Student093
- Demo Student095
- Demo Student096
- Demo Student097
- Demo Student098
- Demo Student099
- Demo Student101
- Demo Student102
- Demo Student103
- Demo Student104

Hrs:07 Crs:01, Hrs:07 Crs:01, Hrs:08 Crs:02, Hrs:015 Crs:01, Hrs:917 Crs:214, Hrs:98 Crs:22, Hrs:88 Crs:111, Hrs:88 Crs:22, Hrs:88 Crs:22, Hrs:88 Crs:22, Hrs:88 Crs:22, Hrs:77 Crs:111, Hrs:88 Crs:22, Hrs:88 Crs:111, Hrs:77 Crs:111, Hrs:88 Crs:111, Hrs:88 Crs:111, Hrs:88 Crs:111, Hrs:88 Crs:111

PREVIEW

To: AaDemo000 AStudent000 <Student000@demonstrationstudent.com>
From: Demonstration Mortgage Corp <demonstration@mortgageeducation.com> via <notifications@mortgageeducation.com>
Subject: Course Status

mortgageeducation.com

To: AaDemo000 AStudent000 <Student000@demonstrationstudent.com>

AaDemo000,

You currently have several incomplete courses and the deadline is approaching. Please see your status below.

[Login to your account](#)

Course Name	Status
7 Hour SAFE Core: 2023 Online Self Study(PREMIUM)(14791)	Not Started
- MortgageCOMPLY 202 - Anti Money Laundering	Not Started
- MortgageCOMPLY 207 - Red Flags	Not Started
- MortgageCOMPLY 201 - ECOA	Not Started
- MortgageCOMPLY 308 - GLB and Privacy	Not Started
- MortgageCOMPLY 316 - Fair Lending	Not Started

Enjoy your studies!

Add notification@mortgageeducation.com to your address book to ensure emails reach your inbox.

Any questions?

Sales : info@mortgageeducation.com

Students
64
(out of 356)

Completion
34%

SUMMARY	Total Courses	AML	CP	D & I	Data Security	DNCIA	E-Sign	FCRA	FHA	FL-ECOA	Fraud	GLB	HMD
Completed	151	26	0	0	0	7	0	0	0	26	26	26	0
Available	442	64	0	0	0	41	0	0	0	63	63	63	0

First Name	Last Name	Role	Courses Completed	AML	CP	D & I	Data Security	DNCIA	E-Sign	FCRA	FHA	FL-ECOA	Fraud	GLB	HMD
Demo	Student375	MLO	0 out of 8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Demo	Student379	MLO	5 out of 5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Demo	Student093	MLO	5 out of 8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Demo	Student095	MLO	5 out of 8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Demo	Student096	MLO	5 out of 8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Demo	Student097	MLO	5 out of 8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Demo	Student098	MLO	8 out of 8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Demo	Student099	MLO	5 out of 8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Demo	Student100	MLO	0 out of 5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Select Report

Category

Format Type

By Course By Requirement

Students

All
 With Courses
 With Incomplete Courses
 With All Courses Completed

Sort by

First Name Last Name
 Hours Remaining Hours Completed
 Hours Required

CUSTOMIZED REPORTS

Certificate Printing

1 SELECT CATEGORY

- CE
- PE
- MortgageCOMPLY
- Exam Preparation

2 SELECT COURSES (2 Courses Selected)

<input type="checkbox"/> COURSE NAME	
<input checked="" type="checkbox"/> MortgageCOMPLY 201 - Fair Lending	152
<input checked="" type="checkbox"/> MortgageCOMPLY 202 - Anti Money Laundering	118
<input type="checkbox"/> MortgageCOMPLY 203 - Fraud	116
<input type="checkbox"/> MortgageCOMPLY 204 - TRID	115
<input type="checkbox"/> MortgageCOMPLY 205 - ECOA	1
<input type="checkbox"/> MortgageCOMPLY 206 - FCRA	2
<input type="checkbox"/> MortgageCOMPLY 207 - Red Flag Rules	2
<input type="checkbox"/> MortgageCOMPLY 208 - DNCIA	1
<input type="checkbox"/> MortgageCOMPLY 209 - HMDA	114
<input type="checkbox"/> MortgageCOMPLY 251 - Servicing	2
<input type="checkbox"/> MortgageCOMPLY 301 - Sexual Harassment	1
<input type="checkbox"/> MortgageCOMPLY 302 - URLA	3

3 SELECT STUDENT (136 Students Selected)

<input checked="" type="checkbox"/> STUDENT NAME	
<input checked="" type="checkbox"/> Demo Student00	2
<input checked="" type="checkbox"/> Demo Student002	1
<input checked="" type="checkbox"/> Demo Student003	2
<input checked="" type="checkbox"/> Demo Student003	2
<input checked="" type="checkbox"/> Demo Student005	2
<input checked="" type="checkbox"/> Demo Student006	1
<input checked="" type="checkbox"/> Demo Student007	2
<input checked="" type="checkbox"/> Demo Student008	2
<input checked="" type="checkbox"/> Demo Student009	2
<input checked="" type="checkbox"/> Demo Student010	2
<input checked="" type="checkbox"/> Demo Student019	1
<input checked="" type="checkbox"/> demo Student105	2
<input checked="" type="checkbox"/> demo Student141	2
<input checked="" type="checkbox"/> demo Student143	2
<input checked="" type="checkbox"/> demo Student145	2
<input checked="" type="checkbox"/> demo Student147	2

4 COLLATE BY

- Course
- Student

PRINT (270 CERTIFICATES)

CANCEL

MASS CERTIFICATE PRINTING



Corporate Launches Mandatory Compliance Modules 5h MLO Corporate Compliance

Ex: Company Pays Compliance: \$40

MLOs Pay to Convert Hours and purchase State Hours: \$39 + State and saves 5 hours



MLOs Convert 5 hours of accrued training to CE

Remaining 2/3 Federal Hours + MLOs Choose their States

SELECT YOUR STATES

- Alabama
- Alaska
- American Samoa
- Arizona
- Arkansas
- California
- Colorado
- Connecticut
- Delaware
- District Of Columbia
- Florida
- Georgia
- Guam
- Hawaii
- Idaho
- Illinois
- Indiana
- Iowa
- Kansas
- Kentucky
- Louisiana
- Maine
- Maryland
- Massachusetts
- Michigan
- Minnesota
- Mississippi
- Missouri
- Montana
- Nebraska
- Nevada
- New Hampshire
- New Jersey
- New Mexico
- New York
- North Carolina
- North Dakota
- Ohio
- Oklahoma
- Oregon
- Pennsylvania
- Puerto Rico
- Rhode Island
- South Carolina
- South Dakota
- Tennessee
- Texas
- Utah
- Vermont
- Virgin Islands
- Virginia
- Washington
- West Virginia
- Wisconsin
- Wyoming

BUY NOW

certificate of completion

Demo Student#000 NMLS ID: 95581207
Completed the following education on 07/14/2020 at 12:20 PM ET
New York Compliance - Course Ref: NYCC 2020-11672 - 6
Course ID: 11672

All Corp Compliance and NMLS CE Completed