



## Close more loans. Win more clients for life.

The Clever Concierge Team and Agent Matching Platform connect your borrowers with trusted real estate agents, enabling your loan officers to close more loans with less work.



**Our experienced team of licensed concierges help manage the home buyer journey, and our agents reinforce your lending relationship with your customer throughout the entire process.**



### Get your borrowers the White Glove service they deserve.

It all starts with a consultation between your borrower and a member of our Concierge Team to discover your customer's unique needs. Then, our team provides hand-picked agent matches with top Realtors, and their experience is monitored from first meeting to under contract. Your loan officers will be notified if they ever need to step in.

**It's no wonder our home buyers call our concierges 'trusted experts.'**

### Save your borrowers money with .5% Clever Cash Back.

We work hard to keep every member of your borrower team on the same page, so you and your borrowers stay connected from start to finish. Plus, Clever Cash Back puts 0.5% of the home purchase price back into eligible\* homebuyers' wallets, making your customers even happier that you introduced them to Clever.



### Meet your newest nurture and retention solution.

When home buyers need more time, our team stays in touch until they're ready. Our platform and service creates pipeline security while increasing conversion rates with each borrower we help nurture. And borrowers love to stay with Clever through closing to earn their 0.5% Clever Cash Back incentive.

## Free up your workflow and close significantly more loans working with Clever.

There's more than one way to work with Clever. In fact, we cater to our partners' specific needs. Our onboarding and communication options are customizable. That means we fit into the model that makes the most sense for you and your borrowers' customer journey. Here's some options we offer:

#### Pre-Approval Auto Send

Automatically send your pre-approvals to Clever for our service.

#### CRM Integration

Integrate Clever with your CRM to start matching with a click.

#### Landing Page

Easy manual entry of borrower's info to start the process.

**Let us know when you're ready to get started.**

\*Home buyers purchasing a home worth over \$50,000 in one of 41 qualifying US states are eligible.