

Broker



In your loan management system, the broker acts as a bridge between borrowers and lenders. They don't directly issue loans themselves, but rather work to match borrowers with the most suitable loan options based on their financial profile and needs. Brokers typically have relationships with multiple lenders, allowing them to shop around for the best rates and terms on behalf of the borrower.

There are three key sections to streamline broker management and facilitate their involvement in the loan origination process:

- **Add New:** This section allows authorized users to create new broker profiles within the LMS. Here, you can likely enter details like the broker's name, contact information, licensing details (if applicable), and any relevant notes.
- **List All:** This section provides a comprehensive list of all brokers currently registered in the LMS. This allows for easy searching, filtering, and selection of brokers based on specific criteria.
- **Call Information:** This section might be dedicated to managing communication and interaction with brokers. It could potentially offer features for logging phone calls, recording notes from conversations, or storing communication history related to each

broker.

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