



Major Wholesale Lenders Launch BrokersUnited to Give Mortgage Brokers the SocialSurvey CX Platform

San Ramon, CA - November 24, 2020

Wholesale lenders are uniting to power their broker partners like never before. In an unprecedented move to level the playing field for mortgage brokers, today we announce a new partnership called BrokersUnited (BrokersUnited.com). The program is aimed at solving the huge technology disparity between brokers and lenders. Brokers, usually smaller organizations, may not have the budget or resources to deploy SaaS solutions to power their businesses. Given these limitations, few have access to enterprise platforms like SocialSurvey. With this new partnership, that will change.

To kick off the BrokersUnited program, brokers who join will enjoy free marketing and reputation services which includes;

1. Loan Officer and Location profile pages highlighting their brand, including licensing info, about me, hobbies, awards, as well as aggregated reviews from sites like SocialSurvey, Zillow, Google and more
2. A listing on a search mortgage broker site to help consumers find the highest rated mortgage brokers in their area
3. The SocialSurvey Platform to automatically survey borrowers after closing. This includes;
 - a. Borrower, Co-Borrower Reviews
 - b. Real Estate Agent Reviews
 - c. Automated Review Sharing on Facebook, Twitter, and LinkedIn
 - d. Automated Issue Escalation / Resolution
 - e. Widgets and APIs for sharing reviews on websites & blogs
 - f. Zillow Reviews Integration
 - g. Google Reviews Integration
 - h. Mortgage Connect Program^[1] (Connect your reviews with LendingTree, MBS Highway, Mortgage Coach, WowMi, MAXA Designs, SimpleNexus, Mortgage Mapp, and more)
4. Annual Customer Satisfaction Benchmarks
5. Annual Broker Awards for Customer Satisfaction
6. Support from the CX expert team at SocialSurvey

Many wholesale lenders cannot effectively capture customer experience data to improve their products and services. With this new program, brokers will have access to automated customer experience data, tools to manage compliance, and marketing automation technology to generate and share their great reviews using the SocialSurvey platform. SocialSurvey was built for the mortgage industry and current CX program users report an average of 14% growth.

“BrokersUnited offers a massive opportunity for broker partners to reach all of their customers in a powerful way. The objective of this collaboration is supporting the growth of the broker channel through optimization of customer experience, marketing of their business, and collaborating with lenders to develop solutions from the insights gained. Caliber Home Loans is proud to be an inaugural member of the platform!” - Dave Schroeder, EVP of Wholesale Lending, Caliber Home Loans.

“We are excited to be working with SocialSurvey to give the Wholesale Broker Channel access to tools to improve their presence on social media, just like their retail counterparts currently enjoy.” - Matt Ostrander, CEO & Co-founder, Parkside Lending.

“We are excited to support the mortgage broker community by partnering with SocialSurvey and BrokersUnited. This is aligned to our strategy to provide brokers with the technology, tools and resources they need to compete and win in the markets they serve.” - Kimberly Nichols, Managing Director, PennyMac Broker Direct, a division of PennyMac Financial Services, Inc. (NYSE: PFSI)

When will this launch?

This is all happening very fast. The initial group of Brokers will launch in Mid-December. 50,000+ others will launch in Q1 2021

Who are the Wholesale Lenders participating?

While many wholesale lenders will participate, the initial group includes Caliber, Freedom, PennyMac, PRMG, Fairway, Newfi, Parkside Lending, Home Point Financial and more. This means that brokers can automate SocialSurvey review requests and sharing workflows on every loan closed through any of these major partners.

How do Brokers get signed up?

Visit www.brokersunited.com to sign up. BrokersUnited is open to any broker and we welcome participation from any Wholesale Lender, large or small.

About BrokersUnited

BrokersUnited (BrokersUnited.com) is a strategic consortium between mortgage lenders and brokers, launched by a group of major wholesale mortgage lenders and technology companies. The mission of BrokersUnited is to boost the visibility of mortgage brokers, while putting valuable CX feedback about those brokers in the hands of lenders. Members of BrokersUnited

have access to industry-leading enterprise CX and reputation management tools, regardless of company size. Launched in 2020. For more information, visit www.brokersunited.com.

About SocialSurvey

SocialSurvey is a rapidly growing provider of experience management software. Using its integrated, cloud-based platform and customizable processes, any business can manage customer and employee experiences across their products, locations and brand(s). By driving behavioral change, SocialSurvey delivers impactful business outcomes including increased customer satisfaction, brand loyalty, online reputation and visibility, as well as improved employee engagement, and compliance. Founded in 2015, SocialSurvey is headquartered in San Ramon, Calif. and backed by Kennet Partners LLC., Silicon Valley Data Capital, Tri-Valley Ventures, and Wilson Sonsini Goodrich & Rosati. For more information, visit www.socialsurvey.com or call +1 (888) 701 4512.

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[1] Eligibility requirements vary by partner