



servicer edition

**Reach New Heights
in Your Ability to Serve**

Retail Financing for your Business

Reach New Heights in Your Ability to Serve

Congratulations! You have built a great business and now it is time to expand. Servicer Edition (SE) offers member account processing with the power of a core processing system for everything your members will need to take advantage of your products and services.

What is Servicer Edition?

A cooperative approach to business, Servicer Edition is a robust suite of products and solutions that lets businesses get creative, leverage their relationships, and simplify their technology decisions.

Having a strong centralized solution like Servicer Edition will inspire your teams to “flip the switch” to activate new services and build new solutions, without the delays and expensive extra investments that are the death of so many new initiatives.

Who is Servicer Edition for?

Built by a network of over 350 financial institutions in business for over 50 years, Servicer Edition was designed to be a comprehensive set of tools that could be leveraged by any company that provides account servicing. Companies of all sizes and types can realize great benefits by deploying Servicer Edition. Institutions utilizing the Servicer Edition platform today provide services in the following areas:

- Mortgage
- Bookkeeping
- Compliance and Auditing
- Retail Finance
- Collections
- Call Centers

We are adding more solutions every day that lend themselves to entrepreneurs looking for a way to serve their customers.



Servicer Edition offers a comprehensive account processing system in tandem with a collaborative CUSO business methodology to constantly develop and deliver new solutions my customers need.

Liz Winninger, CEO, Xtend

Core Tool Set Key Statistics

- 1.3 million loans serviced on the platform
- \$27 billion in total loan disbursements and \$19 billion in current balances
- 295K online credit cards managed
- \$1.6 billion in credit card disbursement limits managed by platform
- More than 73K mortgages managed by online with \$9B in total disbursements
- Native loan origination system generates more than 20,000 new loans per month
- Average more than 45K new loan applications per month
- Compliance team reviews more than 150,000 BSA logs per year
- Member Service Contact Center is averaging over 50,000 inbound member service calls a month – over a half a million a year
- Outbound Contact Center team makes 4,500 targeted calls to members each month
- Outbound Contact Center sends more than 4.3 million targeted and topical e-messages to members annually
- Collections Team averages nearly 3,000 outbound calls every month



By leveraging various 3rd party integrations, Servicer Edition has provided Life Asset important tools for automating various data transfer processes that were previously performed manually. I am continually impressed by the expertise dedicated to helping me to seek innovation to improve our operations and evolve the business.

Markus Larsson, Founder and Executive Director, Life Asset

Why do I need Servicer Edition?

Today's consumers expect a robust technology experience. They demand ease of use and accessibility to your business no matter where they are. Servicer Edition allows you to be front and center online and through all your customers' mobile devices. On top of that, native dashboards and analytical tools provide you with the means to maximize your data's utility, allowing you to forecast and track your earnings effectively. Support for your operations is never in question with a team of experienced professionals monitoring and assisting you around the clock.

- Reach more customers
- Generate new revenue opportunities
- Simplify technology decisions
- Cooperative design & pricing
- Integrated approach to business
- Gives you a competitive edge



Using the Servicer Edition platform to update key mortgage data makes everything more efficient. And not only is it effective internally, but members are able to make payments and see their mortgage loans via the Servicer Edition online banking and mobile app channels, improving the overall member experience.

Jamie York, CEO, Neighborhood Mortgage Solutions

Would you like to offer new products and services at a fraction of the cost typically seen from other providers?

What about adding online, mobile banking and mobile app. capabilities to your account service experience?

Do you need marketing and collaborative sales technologies to help your clients market to their customers?

Perhaps you've already built a great business, but it's limited by your current situation for having to navigate multiple vendor servicing platforms, or by only being able to offer a very narrow band of services for which you need to expand?

If this sounds familiar, Servicer Edition may be a perfect fit...

Servicer Edition includes a broad suite of products and services that allows you to be creative, better leverage member relationships and simplify future technology decisions.

By incorporating a centralized and parameterized Servicer Edition solution, your team can simply flip the switch to activate an array of new service solutions, without the delay and expense typically incurred with other popular 3rd party solutions.



Servicer Edition reduces the need to navigate multiple platforms finding the right solution for my members. Servicer Edition has the additional features we needed to expand our service levels.

Geoff Johnson, CEO, CU*Answers

Key Benefits

Provides clients a competitive edge for better serving their customers.

Offers tools to reach more customers and generate exciting new revenue opportunities.

Provides dedicated account processing features with the power of a proven and comprehensive "core processing system."

Delivers a robust suite of products and services that allows businesses to get creative, leverage their relationships, and simplify their technology decisions.

Includes a rich technology experience to your customers, no matter what kind of account servicing you may provide.

May dramatically expand the level of services you may offer your customers.

Reduces the need for having to navigate multiple platforms for which you may currently require ability to expand.

As a Servicer Edition client, you are partnering with CIO's of 350+ credit unions and business CUSO's.

We are adding more Servicer Edition solutions every day that lend themselves to entrepreneurs who want to build CUSOs to enhance member relationships and interactive client service capabilities!

Contact us today!

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Servicer Edition is a proven product, brought to the business market by a network of partners, who together have built networks, products, and services that engage more than 350 financial institutions and retail businesses nationwide. In essence, we have been designing and building solutions for years to support CUSOs and organizations like yours!

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