Video Transcript: Regions Mortgage Application Portal Video

Note:
Uplifting music plays.

On screen: Regions Logo appears in green and fades in a circular motion, turning into a play button icon. A cursor clicks on play button.

[Voice-over] Regions' Mortgage Application Status portal

On screen: An image of a couple in their 30's fades in. They are sitting in a coffee-shop looking at a laptop screen. A green rectangle slides in from the right-hand side of the screen with text: Regions' Mortgage Application Status portal is a secure site

[Voice-over] is a secure site that lets you see the status of your application, upload documents and sign up to receive alerts during the review process.

On screen: A new image fades in containing a laptop screen with the Regions Loan Application Status page. The page continues to scroll down and reveals all information including Loan details, Loan Progress, Things We Need, Got questions, etc… The green rectangle slides to the left-hand side of the screen with text: (bullet) View the status of your application, (bullet) upload documents (bullet) sign up to receive alerts.

[Voice-over] Access the portal by:

On screen: A white rectangle wipes over the image with text in center: Access the portal by:

[Voice-over] Selecting the link in the Welcome email you received

On screen: An email message slides into the center of the screen from the right containing the Regions logo and a welcome message. A cursor enters the screen and selects the blue "here" hyperlink. Text below: Selecting the link in the Welcome email you received.

[Voice-over] Or by visiting Regions.com and clicking the Application Status link on the Mortgage page.

On screen: A laptop slides in from the right and into the center of the screen containing the MyMortgage Login page from Regions.com. A cursor enters the screen and highlights the “Application Status” link under the Get Started section. The link is selected. Text below: Or by visiting Regions.com and clicking the Application Status link on the Mortgage page.

[Voice-over] You can log in using your Regions Online Banking ID credentials or your loan number.

On screen: The Regions Loan Application Status page fades in laptop screen. The cursor first highlights the Online Banking link option then the Loan Number link.

[Voice-over] To log in with your online banking credentials, just enter your Regions Online Banking ID and password.

On screen: The cursor selects the Online Banking link and screen fades to the online banking id and password page. The cursor selects the online banking id and types the id then selects the password and types a password.

[Voice-over] If you want to use your Loan Number to log in, but don’t have it handy, your Mortgage Loan Originator can provide it to you.

On screen: The cursor selects the “Back” button and selects the Loan Number link. The page now contains options to type in your Loan number, last name and four digits of your SSN. The cursor fills in all the information and selects the green “Next” button.

[Voice-over] When you first log in, tell us if you’d like to receive notifications with updates about your application.

On screen: The Regions Loan Application Status page fades in with a pop-up containing notification preferences (Email or Cell Phone). The cursor fills in email and phone number then selects the green “Done” button.

[Voice-over] You can update your alert preferences at any time by clicking **Alerts.**

On screen: The pop up goes away, and the cursor selects the “Alerts” link on the top right-hand side of the page. A large white rectangle fades in the center of the page with large Alerts text and a yellow bell.

[Voice-over] On the status page, you’ll see your application details. And, where you see the question mark icon, just hover or tap to get more information about that item.

On screen: The Alert fades and the Regions Loan Application Page is revealed. A mobile phone enters the screen from the right and stops in front of the right-hand side of the laptop so both desktop and mobile views are shown. The cursor on the laptop hovers over the blue circle with white question mark located next to the Mortgage Loan Details text and the pop up information is highlighted on desktop and mobile.

[Voice-over] You'll have a quick view of the overall application status and an explanation of each stage of the process.

On screen: The laptop and mobile device exit the screen and the Mortgage Loan Progress page slides in from the right and is enlarged on screen with a dark blue background. The cursor hovers over the Initial Approval icon/text with pop up information. The cursor slides over to hover each one of the stages and their pop ups (Appraisal Accepted, Approved for Closing and Ready for Closing).

[Voice-over] Under **Things We Need** you can upload files from your own computer. You can also take pictures of documents and upload them directly from your mobile device.

On screen: The Mortgage Loan Progress page slides off and a laptop animates in the center with the "Things We Need" section of the Regions Mortgage Loan Application page. A cursor enters and selects the "Choose File to Upload" button. A pop up is highlighted with option to upload Driver's License. The mouse hovers over the "Choose File" button. A mobile device rotates in from the right and lands in the front of the right-hand side of the laptop. The mobile screen also shows the Things We Need section. The "Choose File to Upload" button is selected on the mobile device and then a pop-up overlay with the Driver's License upload option. Text below: Under Things We Need you can upload files from your computer or upload pictures of documents from your mobile device.

[Voice-over] In each section, just choose the file or image, then click **Upload**…and you'll see when the document is uploaded.

On screen: The mobile device rotates off screen to the right. The cursor on the desktop moves over and selects the "Choose File to Upload" under the "Sales Contract" section. A Sales Contract overlay appears. The mouse selects the "Choose Upload" button and a pop up with files to choose animates in. The cursor selects a file then selects "Upload". The mouse hovers over the Sales Contract file. Text below: In each section, just choose the file or image, then click **Upload**… and you'll see when the document is uploaded.

[Voice-over] When you're done with each section, just select **Mark Complete.** Your Loan Originator will receive a notification when documents are uploaded

On screen: The cursor selects the "Mark Complete" checkbox next to the Sales Contract section. That section slides down to the My Completed Tasks section. The entire screen fades to a dark black overlay and a yellow bell fades in with a dark orange circle and the number "1" in the center. The Mortgage Loan Originator section is also highlighted on the page. Text below: When you're done with each section, just select **Mark Complete** and your Loan Officer will receive a notification

[Voice-over] View all your completed tasks and documents by clicking on the **My Completed Tasks** heading.

On screen: The cursor slides down the page and selects the My Completed Tasks arrow to reveal all completed tasks. Text below: View all your completed tasks and documents by clicking on the **My Completed Tasks** heading.

[Voice-over] If you need to upload additional documents, just select **Mark Incomplete**.

On screen: The cursor selects the Mark Incomplete checkbox within the Sales contract task. Text below: If you need to upload additional documents, just select **Mark Incomplete**.

[Voice-over] The task will move back up to the **Things We Need** section and you'll be able to upload documents again.

On screen: The task slides back up to the Things We Need section. Text below: The task will move back up to the **Things We Need** section and you'll be able to upload documents again.

[Voice-over] If you need to upload a document that doesn't fit in to the other categories, just add it here in the **Miscellaneous** section.

On screen: The cursor moves down the page to the Miscellaneous Documents option of the Things We Need section and highlights it. Text below: If you need to upload a document that doesn't fit in to the other categories, just add it here in the **Miscellaneous** section.

[Voice-over] You can request copies of bank statements digitally from most financial institutions through our third-party vendor Finicity.

On screen: The laptop screen fades to white and animated documents with green dollar symbols animate upward within then the Finicity logo slides in to the center. Text below: You can request copies of bank statements digitally from most financial institutions through our third-party vendor Finicity.

[Voice-over] This can speed the loan review process and you can be sure that your account credentials and information are secure.

On screen: The screen fades to dark with an image of a man staring at his laptop screen containing the Regions Mortgage Loan Application page. A white outlined clock with green dials animates over the image and white outlined clock icon with four green asterisks below. Text below: This can speed the loan review process and you can be sure that your account credentials and information are secure.

[Voice-over] If you cannot find your financial institution, you can upload copies of your bank statements, as well as any other documents needed to verify assets for your loan application.

On screen: A large white question mark animates over the image with a small bank icon within the circle of the question mark. The circle scales up and the bank icon slides up out of it with a document icon and green dollar sign. Green arrows fade in the right and left of the circle. The white circle fades out and three green document icons fade in. Text below: If you cannot find your financial institution, you can upload copies of your bank statements, as well as any other documents needed.

[Voice-over] Under **Asset Statements** select the **Get Digitally** button

On screen: Screen fades to white with an open laptop screen. The screen contains the Things We Need page. The cursor enters and selects the “Get Digitally” button within the Asset Statements area. Text below: Under **Asset Statements** select the **Get Digitally** button

[Voice-over] then agree to the **Terms and Conditions**.

On screen: An overlay appears asking to Verify your account. The cursor selects the Terms and Conditions checkbox then the ‘Continue’ button. Text below: Then agree to the **Terms and Conditions.**

[Voice-over] Search and select each financial institution,

On screen: The Search for your financial institution pop up fades in and the cursor selects the Search box and types in “Fin” while various options are revealed below. The cursor moves down and selects the “FinBank Billable” option. The Enter your FinBank account information page fades in. Text below: Search and select each financial institution

[Voice-over] provide the information requested, then click **Next**.

On screen: The cursor enters in user id and password then selects ‘Next’. The Securely connecting your account page fades in. Text below: Provide the information requested, then click Next.

[Voice-over] Choose the accounts you want to add, then click **Save and Continue**.

On screen: The Accounts page fades in and the cursor selects all the accounts the Save and Continue button. The Adding your Accounts message fades in. Text below: Choose the accounts you want to add, then click **Save and Continue.**

[Voice-over] Select **Search More Banks** to search and add as many accounts as needed to complete your application.

On screen: The Accounts page fades in with the message 'Here are the accounts you've selected to share' and 4 accounts added below. The cursor selects the "Search More Banks" button". The search page fades in. The cursor selects the 'I'm done adding accounts' link then the 'Save and Continue' button. The Generating Report message fades in. Text below: Select **Search More Banks** to search and add as many accounts as needed to complete your application.

[Voice-over] Once you're done adding banks, you'll see a confirmation that your verification requests have been sent.

On screen: The pop-up overlay goes away, and the Regions Mortgage Loan application page is revealed again. The Asset Statements section is highlighted with the message "Your information has been requested from your financial institution". Text below: Once you're done adding banks, you'll see a confirmation that your verification requests have been sent.

[Voice-over] Regions' Mortgage Application Status portal is convenient and secure.

On screen: An image of a couple in their 30's fades in. They are sitting in a coffee-shop looking at a laptop screen. A green rectangle slides in from the right-hand side of the screen with text: Regions' Mortgage Application Status portal is convenient and secure.

[Voice-over] Get started by selecting the link in your Welcome email

On screen: The image fades away and a laptop enters the screen from the center with the email message and link to get started. The blue "here" link is highlighted, and cursor enters the screen and selects it. Text below: Get started by selecting the link in your Welcome email

[Voice-over] or the **Application Status** link on the Mortgage page at Regions.com.

On screen: The Regions MyMortgage Login page fades within the laptop screen. The cursor highlights the Application Status link under the Get Started section. Text below: Or the **Application Status** link on the Mortgage page at Regions.com.

On screen: Regions logo