

Date: 3/19/2026

To: Quorum Investor Partners

From: Lupe Rados, Senior Manager, Real Estate and Investor Servicing

CC:

Subject: New Online Asset Management Approval Feature

In an ongoing effort to modernize and streamline our processes, effective April 1st, 2026, we will be launching our online approval process for asset management related requests. This new feature will allow for decisioning of requests to be made through the Investor Portal, eliminating the need for signed documentation to be submitted. Additionally, the electronic approval form allows for the submission of questions to our Investor Services team directly through the electronic approval form, which will retain all exchanges of information related to each request in the Portal archives.

Here below are examples of the electronic approval forms for various request types. The images below will provide you with the necessary steps to complete and submit the form through the Investor Portal. Once you have reviewed the information that we have provided here, please feel free to reach out to our team at investorservicing@quorumfcu.org with any questions that you may have on this new feature.

Quorum is committed to continuous improvements that will enhance the servicing experience and strengthen our partnerships. We look forward to your feedback on this new feature.

Thank You,

Quorum Investor Services

Asset Management Online Approval Guide



Profile

Logout

'Approvals' section will be available in menu bar



HOME DOCUMENTS INQUIRIES HELP

Investor Name

Investor Email Address

Investor Company Name

Welcome to Quorum's Investor Portal

An efficient way to monitor wholesale loan purchases from Quorum Federal Credit Union.

Tell us about your experience

Documents

11/6/24 - Resources

[Investor Services_Asset Management FAQs and FC Costs_Timelines](#)

4/19/23 - Monthly Reports

[Investor Report - March 2023](#)

4/19/23 - Monthly Reports

[Investor Report - January 2023](#)

Inquiries

No Inquiries

Create New

'Approvals' tile will now be visible

Approval requests will now be visible in this location. Each request will contain:

- Date of the submission
- Description of the request

Asset Management Online Approval Guide

Approval requests can be accessed by clicking on the status, which is a hyperlink to the approval e-form.

Quorum
BANKING THAT'S GOOD. FOR YOU.

HOME DOCUMENTS INQUIRIES APPROVALS HELP | COMPANY: **Investor Portal Test Company 1**

Welcome Lupe

Home > Approvals

Approval History

Start Date: mm/dd/yyyy

End Date: mm/dd/yyyy

Apply

Download Approval History

Approvals

Created	ID	Subject	Status
3/18/26	#43503022145	BMW Test Two	Pending Approval
3/18/26	#43504348336	Test	Pending Approval
3/17/26	#43429935924	Approval of FC Sale Bid Amount	Pending Approval

1

Quorum Visit our main website help@quorumfcu.org

Equal Housing LENDER

Your savings federally insured to at least \$250,000 and backed by the full faith and credit of the United States Government

NCUA
National Credit Union Administration,
a U.S. Government Agency

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Asset Management Online Approval Guide

On the approval page, you will see the e-form and will be able to perform the necessary steps to complete and submit. Here you will be able to do the following:

- View request details and supporting information in the form
- Download the attached Approval Summary
- View the total fees/costs approved to date on this loan
- Authorize a range of fees/costs for “pre-approval” for this loan
- Submit questions or comments on the request
- Decision and submit the request for processing

[← Back to Approvals](#)

Comment or Question on this Request?

Approval of FC Sale Bid Amount ID: 4342995924
3/17/2026, 5:24:19 PM Status: Open

Write a response...

Attach a file (Max file upload size 30MB)

Send

0 Comments

There is no conversation on this ticket.

For any comments or questions related to the request, you may enter those here to be addressed by the Investor Services team.

Fee Approval Request

Loan Number: 0148456789 Request Status: Pending Approval

Borrower, Loan, and Property Details

Borrower Name: Heloc Borrower
Property Address: 123 Main Street
Property Value: \$1,500,000

Loan Status and Supporting Details

Most recent AVM supports value

Download Summary Link: 'Quorum Investor Servicing Approval Summary' will be attached here for viewing or to be shared with other stakeholders

Recommended Action(s):

Approve bid amount

Notes on Recommended Action(s):
None

Action or Fee Amount: \$0

Action Decision *

Approved

Denied

Designated loan fee approval for range of costs :

Estimated range of foreclosure costs for this loan account: none
(This amount was based on FNMA and state specific guidelines)

Total Fees to Date: \$0

By checking this box you authorize Quorum FCU to approve fees within the stated range on your behalf. Additional amount above the range will be communicated to you for approval.

Submit

For any questions on this new feature, please contact our Investor Services team. Thank you!