

COMMERCIAL LENDING SOLUTIONS

Spend time doing the things that matter most with Virtual Loan Assistant™

Collect financial documents with ease.

Say goodbye to tracking documents with spreadsheets and emailing customers from your inbox when things are overdue. Virtual Loan Assistant™ manages the entire workflow, helping you collect tax returns and other performance requirements quicker and easier than ever before.

- Automatic notifications sent to the customer and agencies-of-record for the life of the loan.
- Document requests and correspondence tracked within the system.
- View key data such as bank relationships, open loans, and credit review status with one-click.

"I enjoy helping clients grow their businesses, but keeping up with annual credit audits and collecting financial documents takes me away from that. It's a relief to have technology that simplifies this process. This software [Virtual Loan Assistant] has truly transformed our department."

| 15-year commercial lender, NE Ohio community bank

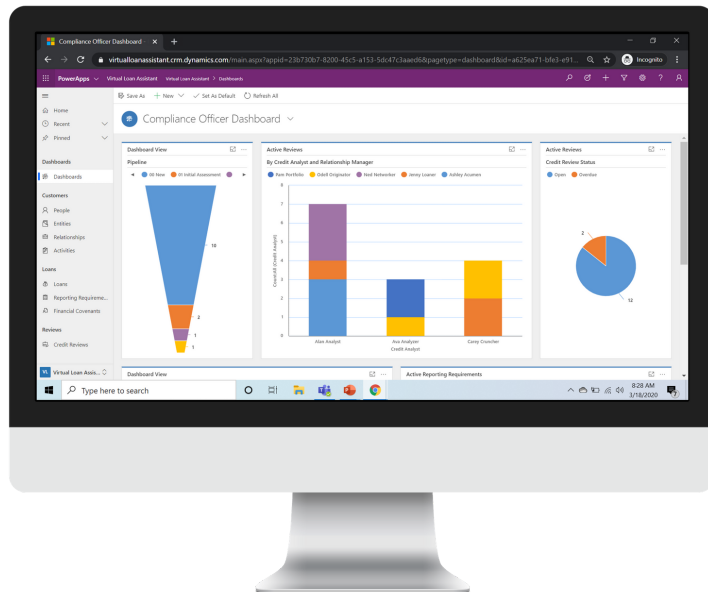


Improved transparency for credit reviews.

Not only will Virtual Loan Assistant™ provide everything your team needs to effectively process credit reviews, it also gives you the tools to help oversee credit operations within your department.

You'll have access to Credit Review Dashboards that provide a snapshot of overall credit audit compliance - requirements by status, by due date, by credit analyst, by portfolio manager, etc.

Every view is based on employee role and the data displayed can be expanded with a single click for more in-depth details.



Compatible with your core.

Simple and seamless is the goal any time you're adding new technology to your business. That's why we developed the Virtual Loan Assistant™ using Microsoft's Power Apps. Not only will your data be stored on Microsoft's secure cloud, the Power Platform provides easy integration with third party apps, including non-Microsoft applications like Jack Henry, FISERV, and FIS.

Each bank's core setup is different. Our team will work with you to identify the right integration points to meet your needs.

Schedule a free commercial credit audit today!

Contact us for a FREE personalized commercial credit audit and see how Virtual Loan Assistant™ can benefit your financial institution.

Visit www.trellispoint.com/virtual-loan-assistant