



The NEO Experience

Tools to help you manage your home and finances and become a successful homeowner

BRENT WILLIS
A PROFESSIONAL MORTGAGE EXPERIENCE

The NEO Experience App Overview

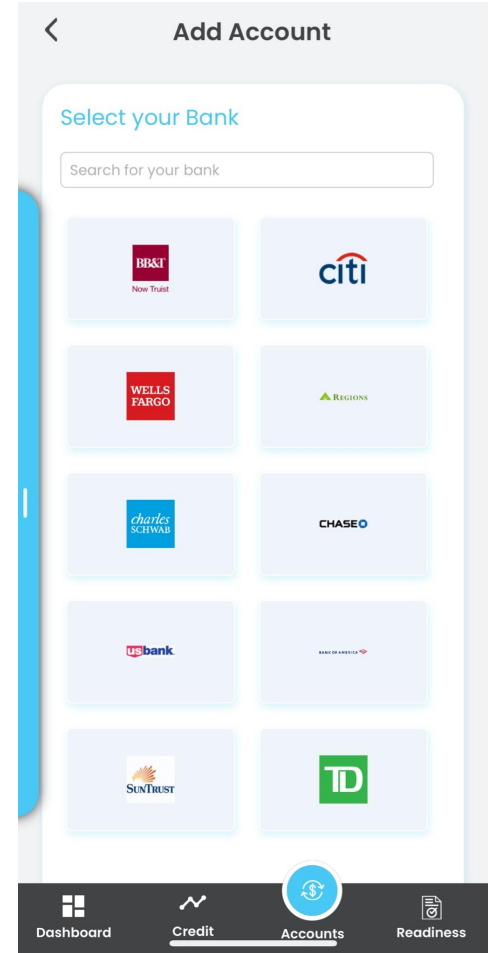
- Create and manage your budget
- Track and learn how to increase your credit score
- Keep track of home projects, paint colors, appliances and more
- Access a Mortgage Readiness Assessment for a clear path to homeownership
- Shop for homes
- Relocate with less stress than ever before

Connect Your Financial Accounts

- Connect your bank, investment and retirement accounts to your NEO Experience app

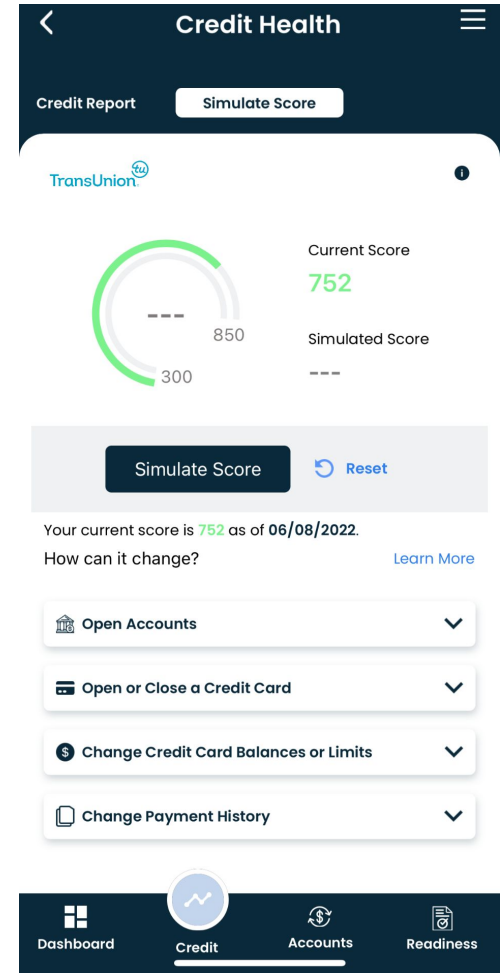
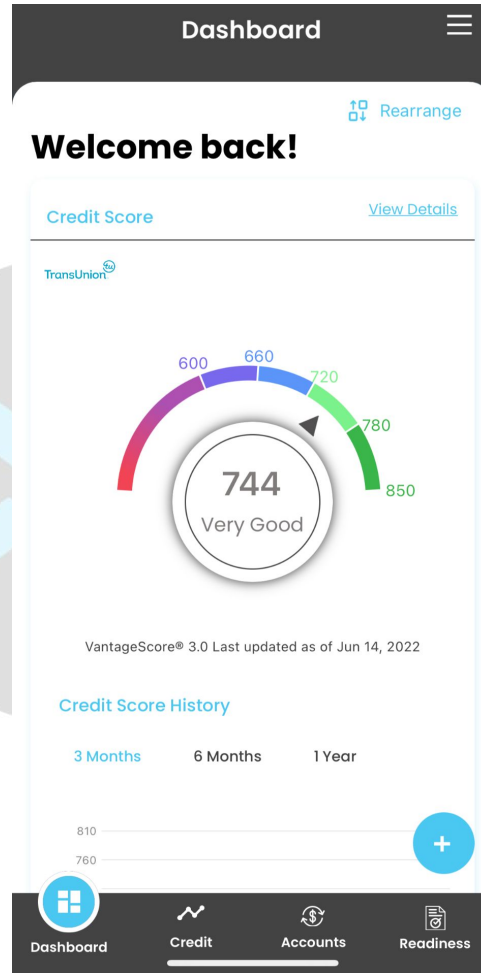
*Note - your credentials will never be stored in the app itself

- View assets, liabilities and transactions from all of your connected accounts in one place



Track and Improve Your Credit Score

- Real-time credit reporting including factors that influence your current score
- Simulate paying off debts, opening new lines of credit to see how your score will be affected
- Allows you to make educated decisions that will benefit your overall financial health





Tell us your Objectives

Select all that apply

I want to improve my credit

I want to start saving

I want to manage my finances

I want to pay off debt

I want to buy a car

I want to consolidate my debts
(ie. student loans, credit card)

I want to buy a home

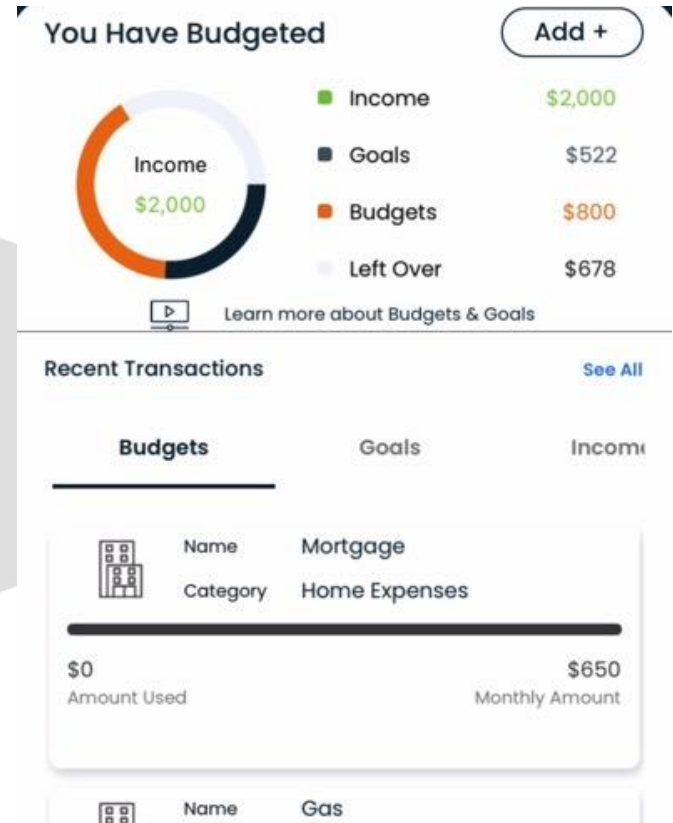
Continue

Make Improvements in the Area of Your Choosing

- Whether it's improving credit, buying a home or becoming debt-free, we'll help you along the way
- Track your Mortgage Readiness by factoring in credit, assets, available funds and more!

Create and Follow a Budget

- Reach your financial goals by creating a realistic budget based on income, expenses and savings
- Set goals in order to create a path to reaching them
- Track how well you're following your budget based on recent transactions



Home Search Feature

- Included in the app is a Home Search feature
- Adjust your target price, location and home details to match what you're looking for
- When ready to sell, get an estimated list price of your current property based on the home and surrounding market


Relocation Services

- Make moving a breeze with a combination of technologies to simplify moving
 - Change your address
 - Forward mail
 - Schedule movers
 - Set up utilities



Welcome Back, Lara


Keep going on your moving tasks



Forward your mail

Don't let your mail get lost. Update your address with USPS in minutes.

Completed tasks

Done

Set up internet / TV

Compare rates and packages. Work or stream on day one.

Today **Essentials** Moving

Renovation Services

- Get the most ROI on the sale of your home
- Renovate without any upfront costs to get a higher return on investment from your sale
- Always let us know when you're thinking of selling so you can leverage this program

Renovate for massive property gains

Without the **upfront cost** and uncertainty associated with home improvements.

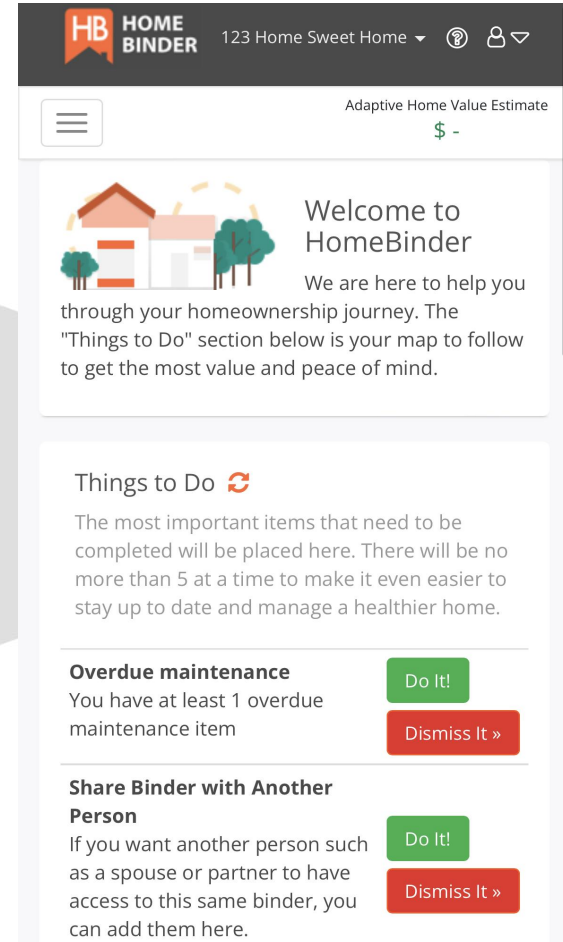
[Get started](#)

[Learn more](#)




Home Concierge

- Keep track of paint colors, appliances, receipts and all other details of the home
- Receive reminders so you can be proactive about your home maintenance
- Appliance recalls



HB HOME BINDER 123 Home Sweet Home ⓘ 👤

Adaptive Home Value Estimate
\$ -

 **Welcome to HomeBinder**
We are here to help you through your homeownership journey. The "Things to Do" section below is your map to follow to get the most value and peace of mind.

Things to Do ↻

The most important items that need to be completed will be placed here. There will be no more than 5 at a time to make it even easier to stay up to date and manage a healthier home.

Overdue maintenance Do It!
You have at least 1 overdue maintenance item Dismiss It »

Share Binder with Another Person Do It!
If you want another person such as a spouse or partner to have access to this same binder, you can add them here. Dismiss It »



We're not just your Mortgage lender,
we're your advisor for *life*.