

Loan Mate



Your company will grow when your team can focus on business development instead of back-office tasks.



Save time

Losing hours every week from the day-to-day tasks of managing the loan process admin work? Though the administrative work is essential, it can often prevent you from focusing on your sales and core business.

Loan Mate virtual assistants can handle these tasks, saving you significant time.



Focus on clients

Your clients get the help they need when they need it. Our virtual professionals are fully dedicated to you, supporting your business, your clients and your growth, providing the service your clients deserve. This allows you to focus on building and cultivating new business.



Grow your business

The Loan Mate model is a win-win to help grow your business. With our highly skilled team of virtual assistants, you immediately eliminate the burden of administrative tasks and lower your overhead costs without sacrificing customer service and support.



Why Loan Mate?


The mortgage industry is constantly changing. In order to grow and thrive in a competitive world, innovation is key. Serving mortgage companies across North America, Loan Mate allows you to operate more efficiently with high-touch, client-facing virtual professionals.

Loan Mate virtual assistants have extensive capabilities when it comes to supporting your business.

Your Loan Mate virtual assistant can be trained to perform tasks for Refinance, Purchase and Reverse mortgages with VA, FHA, USDA, NonQM Fannie and Freddie including:

- Adding or correcting borrower information
- Adjusting and updating economics
- Updating names and addresses, other corrections
- Making edits and corrections including expenses and income
- Changing programs in system
- Updating disclosures
- Reviewing loan changes
- Qualifying new changes
- Remarketing past accounts
- Client communication
- Collecting signatures
- Distributing memos
- Collecting new client information for new business quotes
- Processing mortgagee changes
- Sending documents for e-signature
- Processing declines and cancellations
- Handling insurance policy info
- Completing certificates of insurance
- Ordering verifications
- Policy checking
- After-hours phone service
- File auditing
- Client info follow up
- Prospecting
- Marketing and social media management
- And much more!

Finding the right fit



Loan Mate virtual assistants are a direct extension of your business. For this reason, we do not simply assign someone to you. Instead, you are part of the hiring process from the beginning. Loan Mate works with you to conduct a two-stage interview to ensure that you are in control of who you hire.



How many hours can your team member work?

Loan Mate virtual assistants work a minimum of 40 hours per week per team member. You can request additional hours as needed. Though you pay for their time, you do not pay their benefits, payroll tax or unemployment. Loan Mate takes care of that, immediately decreasing your overhead costs.



Why Loan Mate?

The mortgage industry is constantly changing. In order to grow and thrive in a competitive world, innovation is key. Serving mortgage companies across North America, Loan Mate allows you to operate more efficiently with high-touch, client-facing virtual professionals..

1 Hire the best

Loan Mate helps you find the best virtual assistants for your team. You are part of the process from the very beginning and have full control over who you hire.

2 Top quality training

Loan Mate training courses lessen the challenge of on-boarding your virtual assistants. Our foundation skills training gets your new team members up and running in just a few short weeks.

3 Connect Virtually

Our secure Loan Mate Cloud™ system gives you direct access to your virtual assistants during business hours and allows your VA to access company systems.

4 Focus on growth

Let your sales team do what they do best—generate revenue and focus on clients. Your virtual assistants will handle the administrative tasks that don't require a license.