



## CASE STUDY

300 West Wieuca Road, Building One, Suite 300 Atlanta, Georgia 30342 [www.williammills.com](http://www.williammills.com) 678-781-7200 FAX 678-781-7239

### **Pinnacle Financial: Avid User of DocuTech's ConformX Accelerates Compliant Loan Closing Process**

- Who:** Linda Morgan, Total Quality Manager  
Pinnacle Financial, Orlando, Fla.  
*Lender presented with Consumer Advocate Harj Gill's Seal of Approval as the Nation's Most Ethical Lender for 2006*
- When:** DocuTech customer since 2003, ConformX installed in 2005
- What:** Pinnacle Financial upgraded to DocuTech's ConformX, a Web-based solution that accelerates the closing process through document management, in order to:
- Enhance customer service
  - Increase loan closing volume
  - Streamline compliant document generation

#### **The Challenge:**

In 2003, Pinnacle Financial began evaluating its loan origination system (LOS) and related technologies with an eye on operating efficiencies and integrations. This evaluation included an in depth look at document preparation, which at the time was DocuTech's DT Classic. While Pinnacle Financial opted for another LOS, the lender was so pleased with its document prep software it upgraded to DocuTech's Web-based solution, ConformX.

Linda Morgan, Total Quality manager for Pinnacle Financial has been impressed with DocuTech's responsiveness to regulatory and legislative changes. She also enjoys the fact that DocuTech goes the extra mile to understand their business and develop solutions that accelerates the loan process.

*"DocuTech has always been very responsive and very willing to work with us as a partnership rather than viewing us simply as a customer," said Morgan. "When we were evaluating our technology systems and procedures, DocuTech stood out as a company we must continue to work with. ConformX is the solution that meets the needs of Pinnacle Financial."*

#### **The Solution:**

A DocuTech customer since 2003, Pinnacle Financial decided to upgrade to ConformX in 2005. ConformX is DocuTech's Web-based document solution. ConformX accelerates the closing process through document management and by guaranteeing compliance. ConformX can be customized to meet a wide variety of vendor requirements and it insures compliance through automatic calculations, data safeguards and advanced document verification. ConformX works behind the scenes to create full document packages with minimal data entry. In addition,

ConformX can also securely deliver printable documents, e-mail and Web-posting options from any Internet location around the world.

**The Result:**

Pinnacle Financial's upgrade from DT Classic to ConformX was seamless and included a thorough testing process to guarantee a quick integration. From the moment of installation, the lender could easily retrieve and automatically populate closing documents. The ConformX integration had an immediate payoff by decreasing the time spent closing each loan by 20 minutes. Saving time in these increments made it possible for Pinnacle Financial to work more efficiently and close more loans per month. As an added benefit, Pinnacle Financial can maintain document databases at remote locations with ConformX.

*“ConformX’s Web-based design allows us to visit our remote fulfillment centers and pull documents directly, increasing our employee’s productivity,” said Morgan. “The experience – from implementation to the day-to-day use of ConformX – has been wonderful.”*

**About Pinnacle Financial**

Pinnacle Financial, headquartered in Orlando, Fla., is one of the nation’s fastest growing independently owned mortgage lenders with fulfillment centers in Tampa Fla. as well as Illinois, Virginia, California and Arizona. As a direct lender and serving customers for 18 years, Pinnacle Financial received the Consumer Advocate Harj Gill’s Seal of approval as the Nation’s Most Ethical Lender for 2006. For more information visit the company’s Web site at [www.pinnaclefinancial.com](http://www.pinnaclefinancial.com).

**About DocuTech**

Since 1991, DocuTech Corp. (DocuTech) has provided compliance services and documentation technology for the mortgage industry. To date, DocuTech has the largest, most complete document library in the industry with thousands of customized investor documents, federally and state compliant in all 50 of the United States and is an all-in-one fulfillment center (DocXcel™) that helps companies to increase the number of compliant initial disclosures, printed and mailed, to prospective borrowers within government-mandated deadlines.

DocuTech's software interfaces with leading loan origination systems (LOS) and enables mortgage professionals to generate documents locally, which increases efficiency, reduces time, eliminates errors and omissions and provides added convenience to homebuyers. For more information, call 800.497.3584 or visit the company's Web site at [www.docutechcorp.com](http://www.docutechcorp.com).