



## Blue Sage TPO Portal

### Empower Partners. Accelerate Loan Flow. Maintain Full Control.

Blue Sage enables lenders to manage all third-party origination (TPO) channels—including wholesale and correspondent (non-delegated and fully delegated)—within the same cloud-native platform used for retail.

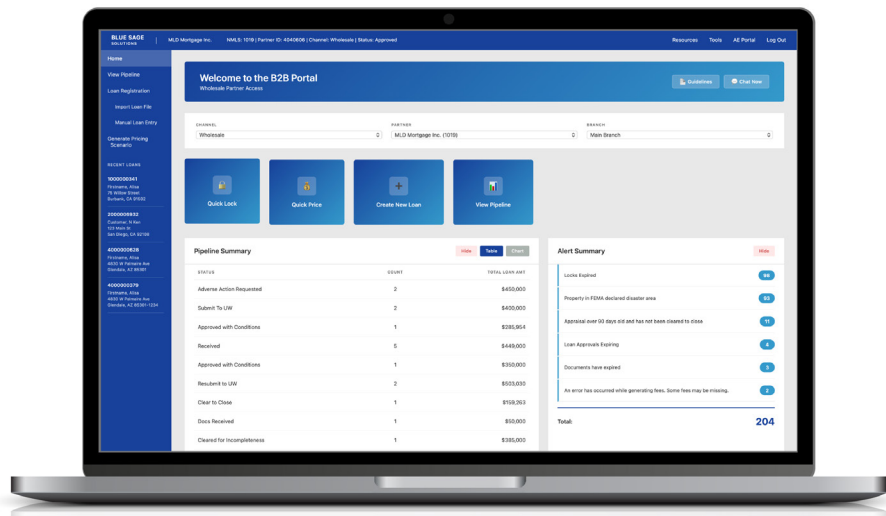
Through secure partner portals and administration tools, lenders can onboard brokers, automate workflows, and maintain full pipeline visibility—all within a single system.

### Faster, More Connected and Productive Partners.

Give brokers and sellers a modern, intuitive experience to register, price, submit, and review pipeline loans—while maintaining the control needed to manage risk, compliance, and investor eligibility.

“For us, it wasn’t just about adding another portal—it was about giving our broker partners a faster, more intuitive way to work within a fully connected platform. The ability to streamline workflows, improve visibility, and reduce friction across the loan lifecycle has been a meaningful step forward for our team and our partners.”

**ANDREW BADSTUBNER**  
CIO  
FIRST COMMUNITY MORTGAGE



## Key Capabilities

### AUTOMATED GENERATION OF INITIAL DISCLOSURES

A streamlined, configurable portal designed for speed and ease of use.

- Quickpricer tool for loan quotes/scenarios
- Register, price, and lock loans in one place
- Smart loan search with loan action shortcuts
- Dashboard with quick-access links and shortcuts
- Personalized workspace with saved preferences

### REAL-TIME PIPELINE VISIBILITY

Clear insight into loan status improves execution and reduces friction.

- Visual loan status tracker with configurable status details
- Real-time pipeline summaries

### PARTNER MANAGEMENT & CONTROL

Centralized tools to manage broker relationships and enforce eligibility.

- Approve, activate, or manage broker and correspondent partners
- Track licensing via NMLS integration
- Maintain communication preferences, and user and branch management

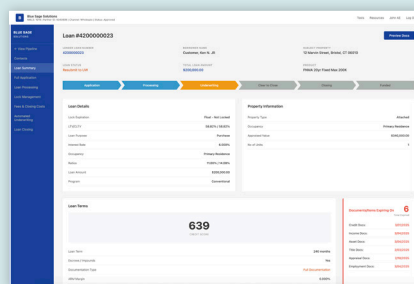
### INTEGRATED PRICING & LOCKING

Streamlined lock workflow connected to industry-leading pricing engines.

- Simplified lock experience with smart defaults
- Support for locks, relocks, and extensions
- Full pricing history visibility and lock confirmation generation

## One Platform. All Channels.

Blue Sage supports retail, wholesale, correspondent (delegated and non-delegated), and consumer direct lending within a single system—reducing complexity while improving operational efficiency.



## Why Lenders Choose Blue Sage for TPO Channels

- Simplifies onboarding and management across broker and correspondent channels
- Supports both delegated and non-delegated correspondent workflows
- Improves pipeline visibility and control across all TPO production
- Reduces manual work across workflows and partner interactions
- Ensures pricing accuracy, compliance, and investor alignment
- Streamlines conditions management with clear visibility, faster resolution, and fewer touchpoints

## Let's Talk.

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