

# Who do you call?

# Quick Reference Guide



|   | Name       | Email                 | Phone        |
|---|------------|-----------------------|--------------|
| Who was the TRAINER in Newark for Loan Officers? He said something and I want to clarify. (NOT LEAD LO) | Derek Good | dgood@calleequity.net | 740-349-7082 |

## Sales Manager

|  |  |   |  |
|--|--|---|--|
| Building sales - Setting Realtor meetings - Goal Setting - Approval for loan under 30 days from application to closing     | Bob McKearin—Exec VP of Sales—PA<br>John Garofalo - MD<br>Dana Ferris - MD, VA<br>Rob McGeorge - Southern OH, GT<br>Tony Anderson - NC<br>Tom Piecenski - OH, MI<br>Michelle Piccari - FL<br>Edward Lanzoni - CT<br>Melanie Lund | rmckearin@calleequity.net<br>jgarofalo@calleequity.net<br>dferris@calleequity.net<br>rob@1stbancorp.com<br>tanderson@calleequity.com<br>tpiecenski@calleequity.net<br>mpiccari@calleequity.net<br>elanzoni@calleequity.net<br>mlund@calleequity.net | 614-832-1967<br>202-262-1824<br>203-982-7581<br>513-965-0015<br>919-615-3152<br>614-327-5353<br>407-342-9195<br>860-974-9841<br>740-349-7082 |
| <b>Construction Loans</b> —Builder Approval  | Hilary Barbuto   | hbarbuto@calleequity.net  | 740-349-7082   |
| <b>Construction Loans</b> —General Construction Questions (Look at the construction and renovation folders on Equity Zone) | <a href="#">Click Here</a>   | -   | -  |
| <b>Renovation Loans</b> —General Reno Questions  | <a href="#">Click Here</a>   | -   | -  |
| <b>Operational Sales Support</b> – General Operations Questions: Contact us for your operations related questions          | <a href="#">Click Here</a>   | <a href="mailto:SalesSupport@CallEquity.net">SalesSupport@CallEquity.net</a>  | 740-322-7282   |
| <b>CDA</b> —General CDA Questions  | <a href="#">Click Here</a>   | CDA@calleequity.net   | 740-349-7082   |

## Underwriting

|   |  |  |              |
|---|--|--|--------------|
| Underwriting scenario question  | Your Sales Manager   |  |              |
| Underwriters - contact when you disagree with a condition on a loan underwritten. <b>Email first and if you want to talk, ask them to call you.</b> | Christina Reynard<br>(Assistant Underwriting Manager)<br>Jenni Brown<br>(Assistant Underwriting Manager)<br>Kim Cochran (Senior)<br>Taylor VanDine (Senior)<br>Kevin Yurkovich<br>Amanda Light<br>Chris Armistad<br>Whitney Burbick<br>Michelle Baker<br>Arthur Franco<br>Dianna Burns<br>Hillary Colvin<br>Anthony Adoptante<br>Clarisse Clarin<br>Mylie Soloman<br>Jay Valle | creynard@calleequity.net<br>jbrown@calleequity.net<br>kcochran@calleequity.net<br>tvandine@calleequity.net<br>kyurkovich@calleequity.net<br>alight@calleequity.net<br>carmistad@calleequity.net<br>wburbick@calleequity.net<br>mbaker@calleequity.net<br>afranco@calleequity.net<br>dburns@calleequity.net<br>hcolvin@calleequity.net<br>aadoptante@calleequity.net<br>cclarin@calleequity.net<br>msoloman@calleequity.net<br>jvalle@calleequity.net | No Phone     |
| Underwriting Manager  | Dustin Comisford   | dcomisford@calleequity.net   | 740-349-7082 |

## Marketing

|   |                                   |  |              |
|---|-----------------------------------|--|--------------|
| All things Marketing! (including advertising compliance)  | Cathy Zeno,<br>Marketing Director | marketing@calleequity.net                            | 740-349-7082 |
| New LO Setup - Picture, Customer Database, Top 20 Realtor List, Business Cards                        | Angie Caughenbaugh                | acaughenbaugh@calleequity.net                        |              |
| ERMA setup & questions, how do I send out flyers to my database, Single Property Sites, Video         | Kevin Pisch                       | marketing@calleequity.net                            |              |
| E247 Consumer Mobile App:<br>Initial LO Setup<br>Training and Technical Assistance                    | Marketing<br>Jared Swayne         | marketing@calleequity.net<br>JSwayne@calleequity.net |              |
| Social Media Marketing Expert - social media questions, schedule auto posts, social media audit, tips | Tiffany Good                      | marketing@calleequity.net                            |              |

## Loans in Process

|   |   |  |              |
|---|---|--|--------------|
| Disclosure questions  | Megan Staiger - <i>Snr. Disclosure Specialist</i><br>Katie Coffman - <i>Snr. Disclosure Specialist</i><br>Brooke Hack - <i>Snr. Disclosure Specialist</i> | mstaiger@callequity.net<br>kcoffman@callequity.net<br>bhack@callequity.net |              |
| In process disclosures - Loan Estimate, Change of Circumstances, questions on timing  | Megan Staiger - <i>Snr. Disclosure Specialist</i><br>Katie Coffman - <i>Snr. Disclosure Specialist</i><br>Brooke Hack - <i>Snr. Disclosure Specialist</i> | disclosure@callequity.net  | 740-349-7082 |
| Rate Lock Expert - questions on changing loan programs, extension question, re-lock questions   | Ashley Sweeney, <i>Lock Desk Specialist</i>   | secondary@callequity.net   |              |
| Bond Loan Locks - do these yourself on the bond website and contact the bond agency with questions, email lock to Sam Weeks   | Bond Agency Direct!   | secondary@callequity.net   | Call Agency  |
| Title Company Approval and set up   | Sherri Renshaw  | srenshaw@callequity.net  |              |
| Appraisal Orders - check on appointment date, ETA for report (review Notepad 1st)   | Kylynn Saxton, <i>Appraisal Specialist</i><br>Marissa Crane, <i>Appraisal Specialist</i>  | appraisals@callequity.net  | 740-349-7082 |
| Appraisal Reviewer - condition dispute (email only)   | Brenda Wills  | bwills@callequity.net  | No Phone     |
| Appraisal Issue - this value needs contested, appraiser service issues, appraisers need added to an area  | Amanda Cottrell - <i>VP of Strategy</i>   | acottrell@callequity.net   |              |
| Credit Report - split tri-merge from joint to single, unmarried co-borrowers need credit split, move credit from one file to another, how to re-pull credit, missing the 3rd credit score | Your Processor  |  |              |
| Transfer of case # from other lender to us or vice versa  | Your Processor  |  | 740-349-7082 |
| Best PMI rates for the borrower   | Encompass Home Page or Your Processor   |  |              |
| <i>Processing Managers</i><br>Communication issues, flow of loan problem, questions on processing   | Amy Altier<br>Sandy Spence - <i>Admin Manager</i><br>Jeff Panec - <i>Manager</i>  | aaltier@callequity.net<br>sspence@callequity.net<br>jpanec@callequity.net  |              |

## Closing & Funding

|   |  |                           |   |
|---|--|---------------------------|---|
| Closing Manager - contact with closing problems and at the table issue                                | Hilary Barbuto - <i>Closing Manager</i>  | hbarbuto@callequity.net   |   |
| Closing Disclosure changes or questions   | Megan Staiger  | cd@callequity.net         | 740-349-7082                                  |
| Accounting - appraisal check not cleared yet, customer having issues paying appraisal fee online      | Makayla McGee  | accounting@callequity.net |   |
| Funding - what is the loan wire amount, was the loan funded, title company has not received the money | Josh Buxton  | accounting@callequity.net |   |
| Servicing - first payment questions, escrow issues, any servicing question                            | Samantha Lepley<br>Noel Johnson  | servicing@callequity.net  | If serviced by Equity Resources, 888-288-1789 |
| First payments go to: Equity Resources, Inc. PO Box 5177, Newark OH 43058-5177                        | <a href="http://www.callequity.net/product/mortgage-payment">www.callequity.net/product/mortgage-payment</a> |                           | 740-349-7082                                  |

## Everything Else

|   |   |                                  |                |
|---|---|----------------------------------|----------------|
| Benefits Questions regarding Medical, Vision, Dental, Short Term Disability, Long Term Disability, and Life Insurances - Oswald Companies | Lisa Borden                                   | LBorden@oswaldcompanies.com      | 614-744-4251   |
| Assistance with 401k Rollovers (Account # A29-8001)   | Nationwide Rollover Team                      | -                                | 1-800-548-6436 |
| 401k Investment Advice—The New Albany Wealth Management Group at Morgan Stanley   | Michael Platte                                | michael.platte@morganstanley.com | 614-740-8915   |
| Business to business referrals of credit unions, banks that want to do business with us   | Rob McGeorge                                  | rob@1stbancorp.com               | 513-965-0015   |
| Computer/IT issues—hardware & software, Encompass technical issues  | Art Corell, <i>IT Manager</i>                 | ITHelpDesk@callequity.net        |                |
| Loan Officer: licensing, on-boarding, education & renewals  | Sarah Wurm, <i>HR</i>                         | swurm@callequity.net             |                |
| Payroll - commission questions, base pay questions, overtime, timecards   | Dani Stansbery, <i>HR</i>                     | dstansbery@callequity.net        |                |
| Support Staff: recruiting, interviewing and on-boarding.  | Lisa Wade, <i>HR Manager</i>                  | lwade@callequity.net             | 740-349-7082   |
| <i>EVP of Operations</i>  | Jen Chapman                                   | jchapman@callequity.net          |                |
| Ideas or suggestions for improvement in work flow or communication  | Kelly Welch - <i>Executive Vice President</i> | ideas@callequity.net             |                |
| New office, moving offices, leases  | Amanda Cottrell                               | acottrell@callequity.net         |                |
| Supply Orders   | Cindi Pratt                                   | cpratt@callequity.net            |                |

Don't know who you need? Call Esther and ask her! 740-349-7082