

Welcome to Justine PETERSEN's online loan portal!

The portal allows you to review the details of all the LISC Twin accounts you manage for your clients. It is updated nightly to provide real-time loan data. The following guide visually orients you to navigating around the site.

<https://greatrivers.commongoalsportal.com/>

Dashboard

As a Financial Coach you'll see all the currently active loans that you manage included on the dashboard. If a Financial Coach left your organization and we received notification that their loans should be transferred to you, the loans you "inherited" will show up as well.

The dashboard summarizes all the key information on the loan and additional columns can be accessed by moving the slider bar at the bottom of the screen.

Open an individual loan by clicking on the **Loan #** at the left of dashboard, or on the "view" symbol on the far right.



You can search by loan # and client name in the search bar.

| Loan # | Account Name | Account: Primary Contact | Partner | Loan Amount | Total Outstanding | Application Date | Loan Officer | Term | Loan Type | Account: City | View |
|---------|--------------|--------------------------|---------|-------------|-------------------|------------------|-----------------|------|-----------|---------------|------|
| 1 4564 | | | LISC OH | \$300.00 | \$102.81 | 06/01/2016 | Nicole Reno | 12 | Term | Toledo | 👁 |
| 2 4568 | | | LISC PA | \$300.00 | \$101.84 | 06/02/2016 | Jonathan Weaver | 12 | Term | N. Versailles | 👁 |
| 3 4578 | | | LISC OH | \$300.00 | \$102.70 | 06/08/2016 | Nicole Reno | 12 | Term | Toledo | 👁 |
| 4 4581 | | | LISC OH | \$300.00 | \$102.67 | 06/10/2016 | Kim Crosby | 12 | Term | Toledo | 👁 |
| 5 4582 | | | LISC OH | \$300.00 | \$185.05 | 06/10/2016 | Kim Crosby | 12 | Term | Toledo | 👁 |
| 6 4583 | | | LISC IN | \$300.00 | \$130.58 | 06/10/2016 | Julian Edwards | 12 | Term | Indianapolis | 👁 |
| 7 4584 | | | LISC PA | \$300.00 | \$101.84 | 06/10/2016 | Jonathan Weaver | 12 | Term | N. Versailles | 👁 |
| 8 4587 | | | LISC OH | \$300.00 | \$102.67 | 06/10/2016 | Lisa Urbanyi | 12 | Term | Toledo | 👁 |
| 9 4593 | | | LISC OH | \$300.00 | \$102.54 | 06/15/2016 | Kim Crosby | 12 | Term | Toledo | 👁 |
| 10 4594 | | | LISC OH | \$300.00 | \$128.59 | 06/16/2016 | Kim Crosby | 12 | Term | Toledo | 👁 |

Transaction Information

From the Transaction Information section on the left-hand side bar you can view either the detailed transaction or the payment summary. The "Transactions" page provides information on the account up top so the client has key contact information at hand while viewing their loan. The amounts outstanding are listed and then a detailed transaction history is provided below. The transaction data can be filtered by date.

Financial Coaches can jump to another client or loan using the dropdown boxes.

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Version 1.0.0.3

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Transactions

Account Information Account Name [REDACTED]

Account: [REDACTED] Primary Contact: [REDACTED] Loan Officer: Asante Yugen

[REDACTED]

Loan Information Loan # - 3024

| | | | |
|------------|--------|---------------|----------------|
| Loan #: | 3024 | Principal: | \$63.03 |
| Loan Type: | Term | Interest: | \$11.85 |
| Status: | Active | Fees: | \$0.00 |
| | | Total: | \$74.88 |

All Transaction | All Month | All Year | **View** | **Display:** This Year | Last Year | All

| Date | Transaction Type | Amount | Balance |
|------------|------------------|----------|----------|
| 09/25/2014 | Disbursement | \$300.00 | \$300.00 |
| 11/15/2014 | Payment | -\$26.36 | \$273.64 |
| 11/15/2014 | Interest | \$3.80 | \$277.44 |
| 11/19/2014 | Payment | \$26.36 | \$303.80 |
| 11/19/2014 | Interest | -\$3.80 | \$300.00 |
| 11/19/2014 | Fee - NSF | \$25.00 | \$325.00 |
| 11/25/2014 | Fee - Late | \$15.00 | \$340.00 |
| 12/15/2014 | Payment | -\$26.36 | \$313.64 |
| 12/15/2014 | Interest | \$6.05 | \$319.69 |

The payment summary page provides an overview of past and future payments. It also summarizes payment activity for the current year as well as since inception.

Payment Summary

Loan # 4759 - [REDACTED]

Payment Information

| | | | |
|----------------------|------------|----------------------|------------|
| Last Payment Date: | 02/15/2017 | Next Payment Date: | 04/15/2017 |
| Last Payment Amount: | \$26.42 | Next Payment Amount: | \$26.42 |
| Principal: | \$24.85 | Per Diem Rate: | \$0.04 |
| Interest: | \$1.57 | | |
| Fees: | \$0.00 | | |

| Year-To-Date | | Since Inception | |
|------------------------|----------------|------------------------|-----------------|
| Principal: | \$49.52 | Principal: | \$120.55 |
| Interest: | \$3.32 | Interest: | \$11.55 |
| Fees: | \$0.00 | Fees: | \$0.00 |
| Total Payments: | \$52.84 | Total Payments: | \$132.10 |

Loan Information

The **Loan Information** section provides information about the loan including the interest rate, the term, and detailed delinquency information. The **Account Information** section provides contact information for the client, coach, and JP assigned staff. To update your contact information click on your email address at the top left sidebar and select “edit profile.”

Loan Summary

Loan # 4759

Loan Details

| | | | |
|---------------|------------|----------------|-----------|
| Loan #: | 4759 | Active Status: | Active |
| Loan Amount: | \$300.00 | Amortization: | 12 months |
| Account Name: | [REDACTED] | Term: | 12 months |
| Loan Type: | Term | Maturity Date: | |
| Loan Date: | 08/19/2016 | Interest Rate: | 9.00 % |

Current Balances

| | |
|------------------------|------------|
| As Of: | 05/30/2017 |
| Principal: | \$179.45 |
| Interest Outstanding: | \$0.58 |
| Fees Outstanding: | \$0.00 |
| Total Outstanding: | \$180.03 |
| Principal Undisbursed: | \$0.00 |

Delinquency Information

| | |
|-----------------------|--------|
| Delinquency Days: | 0 |
| Delinquency: Current: | \$0.00 |
| Delinquency: 30 – 59: | \$0.00 |
| Delinquency: 60 – 89: | \$0.00 |
| Delinquency: 90+: | \$0.00 |
| Total Arrears: | \$0.00 |

Documents

The **Documents** section contains monthly statements which are also mailed to the client.

Message Center

The **Message Center** is where coaches and clients can come to view messages generated by the portal.

Reports

The **Reports** section contains a detailed loan portfolio report with comprehensive data on the loans. This can be exported to excel.

Loan Portfolio

User: Tamra Thetford Export To Excel

| City | Loan Officer | Loan Product | Partner | Total Arrears | Delinquency Days | Delinquency Information | | | | Interest Rate | Loan Term |
|--------------------|-------------------------|--------------|--------------|---------------|------------------|-------------------------|----------------------|----------------------|------------------|---------------|-----------|
| | | | | | | Delinquency: Current | Delinquency: 30 – 59 | Delinquency: 60 – 89 | Delinquency: 90+ | | |
| Country Club Hills | Asante Yugen | LISC | LISC Chicago | \$0.00 | 0 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | 9.00 % | 12 |
| Chicago | Asante Yugen | LISC | LISC Chicago | \$0.00 | 0 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | 9.00 % | 12 |
| Toledo | Kim Crosby | LISC | LISC OH | \$0.00 | 0 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | 7.00 % | 12 |
| Cincinnati | Thanapat Vichitthot | LISC | LISC OH | \$0.00 | 0 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | 7.00 % | 12 |
| Highland Park | Robert Saporin | LISC | LISC MI | \$0.00 | 0 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | 6.00 % | 12 |
| Houston | Lucretia Jelks | LISC | LISC Texas | \$0.00 | 0 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | 9.00 % | 12 |
| Providence | Stephanie Jones-Pringle | LISC | LISC RI | \$0.00 | 0 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | 12.00 % | 12 |
| Toledo | Kim Crosby | LISC | LISC OH | \$0.00 | 0 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | 7.00 % | 12 |
| Peoria | Mekayla Eldridge | LISC | LISC Peoria | \$0.00 | 0 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | 9.00 % | 12 |