LENDINGWISE
BROKER BETTER. LEND SMARTER.

CUSTOMER CASE STUDY

CMG FINANCIAL

A 50-state lender that built LendingWise out to its own investor lending

CMG Financial's Spec Financing team moved its bridge, fix & flip, construction and DSCR loans off a generic CRM and into one LendingWise loan file, from broker submission to draws and servicing.

One loan file
for sales, processing, underwriting & due diligence

Own intake
webforms per branch, broker & LO, and on CMG's website

Generated docs
term sheets & loan docs, no longer built by hand

Draws & servicing
in the same system as origination

THE COMPANY

Licensed in all 50 states since 1993

CMG Financial is a **50-state licensed direct lender** specializing in Residential FNMA/FHLMC, VA, FHA, Reverse, Non-QM, DSCR, Construction, Spec Construction, Bridge and Fix & Flip lending. On LendingWise, its Spec Financing team runs **bridge, fix & flip, ground-up construction and DSCR rental** loans.

THE CHALLENGE

A CRM that couldn't run the loan

Before LendingWise, the team worked from a generic CRM. It kept contacts, but not the loan: pipeline status was hard to track, borrower documents were chased by hand, term sheets and loan docs were built by hand, and broker submissions and status updates lived outside the system.

- Tracking pipeline & loan status
- Collecting borrower documents
- Creating term sheets & docs by hand
- Keeping borrowers & brokers updated
- Broker submissions

WHY LENDINGWISE

The functionality, and room to build it out

CMG chose LendingWise for its functionality and for the ability to **build it out to their specific needs**.

CRM to servicing
Contacts, pipeline, origination, documents, draws and servicing in one platform.

Their programs
Pre-built and custom loan programs, plus internal programs & overlays.

Every role
Sales, processing, underwriting and due diligence work in the same loan file.

COMPANY SNAPSHOT

BUSINESS TYPE
Direct lender

LICENSED IN
All 50 states

FOUNDED
1993

ON LENDINGWISE SINCE
2024

LOAN PROGRAMS ON LENDINGWISE
Bridge, fix & flip, ground-up construction, DSCR rental

WEBSITE
cmgfi.com



Justin Stoltz
SVP, Spec Financing, CMG Financial

THE SOLUTION

From broker submission to the last draw, in one loan file

Intake on CMG's terms

Quick App and Full App webforms, unique forms per branch, broker and loan officer, intake forms on CMG's own website, and a borrower portal. Submissions land straight in the pipeline.

Their programs, instant calcs

Pre-built and custom loan programs, internal programs & overlays and loan workflows, with LTV, LTC, ARV and DSCR calculated instantly in one loan file for every role.

Documents that collect & build themselves

Required documents by program, automated collection reminders, and term sheets and loan docs generated from the loan file instead of by hand.

Draws and servicing, same system

Scope-of-work templates, borrower draw requests and Trinity inspections, then a servicing ledger with daily interest accrual, late fees and default interest.

Also in use: Pipeline management · Mass updates · Dashboards, reports & KPIs · Roles & permissions · Open API · Webhooks / Zapier / n8n · Native integrations · Implementation & training · Outsourced processing / underwriting

Who works in LendingWise at CMG Financial: Sales / origination · Processing · Underwriting · Due diligence

THE RESULTS

Every old headache now has a workflow

PIPELINE & STATUS

One live pipeline

Pipeline management, dashboards and mass updates in place of CRM tracking

BORROWER DOCUMENTS

Automated collection

Required docs by program, with reminders that go out on their own

TERM SHEETS BY HAND

Generated docs

Term sheets and loan docs built from the loan file

BROKER SUBMISSIONS

Branded intake

Webforms per branch, broker & LO, plus a borrower portal



> **"We made the switch because we loved the LendingWise functionality and ability to build it out to our specific needs."**

Justin Stoltz, SVP, Spec Financing, CMG Financial

Build LendingWise out to your lending

See the intake webforms, loan programs, document generation and draw management CMG Financial runs on.

Get Started
15-day free trial

Book a Demo

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