To homeownership counselors across the country, CounselorMax® is more than just a premier client management tool. It’s the web application built to take the busy work out of your workflow. The most comprehensive system of its kind, it virtually automates education services, scheduling, data collection and more. In just a few clicks, reporting becomes simply more accurate, easily more compelling. Now more advanced than ever, CounselorMax® enables you to more efficiently complete everything you need to do, so you can accomplish what you truly want to do—to make sustainable homeownership a reality for your clients.

“The 9902 is now the easiest report to do.”

Discover all the ways that CounselorMax® helps you to stay on top of everything. For more information or to sign up, contact us now at counselormax@nw.org.

www.counselormax.com

We have homeownership counselors covered. Online.

Explore new features inside
Take productivity to the Max.

For minimal cost.

Whether being utilized for pre-purchase counseling and education or loan mitigation, CounselorMax provides you every day and every step of the way. Intake, performed in real-time, becomes effortless. Credit reports are pre-populated with liabilities, and accessing scores is easier than ever. Creating and sharing active plans with clients is simple, too. You’ll also be better able to respond to clients’ concerns with convenient tools, such as a built-in automation scheduler. CounselorMax can save you hours of time and trouble, so you can get every minute of yours to produce.

The industry’s most comprehensive reporting tool, now even better.

For both content and accuracy, CounselorMax™ tests the standard for quality reporting. Continuously updated to meet regulatory compliance and your clients’ changing needs, CounselorMax™ is the client management tool that homeownership counselors can rely on for the long haul. In addition to automatically generating the required HUD 9902 report, new all major industry reports are standard in the system, which greatly simplifies HUD, National Foreclosure Mitigation Counseling (NFMC) and NeighborWorks® quarterly reporting. Completing this in a customized reporting tool that is so simplistic that it makes it simple to create a report using any combination of relevant data fields that it’s sure to fit your organization. Further streamlining the ReportMax feature allows you to aggregate data and report on the activity of your affiliates.

More functionality ≠ less work.

As part of its mission to serve the needs of the counseling industry, NeighborWorks has significantly enhanced CounselorMax™ with these added capabilities:

- Loan modification packages, including a standard budget, can be pre-populated with liabilities, and accessing scores is easier than ever. Creating and sharing active plans with clients is simple, too. You’ll also be better able to respond to clients’ concerns with convenient tools, such as a built-in automation scheduler. CounselorMax can save hours of time and trouble, so you can get every minute of yours to produce.

- Along with customizable weekly and monthly budget tools, you also have a choice of two standard budget tools, for a total of three distinct budget options.

- A standard loan application (1003) can be exported for the system by use for such tools as lender loan origination systems.

About CounselorMax

Among the most comprehensive systems of its kind, CounselorMax™ is the user-friendly web-based application designed to help homeownership counselors:

- Create effective outreach campaigns quickly and easily.
- Perform intake with minimal effort.
- Maximize efficiency with powerful pre- and post- counseling tools.
- Save time scheduling and tracking.
- Generate accurate and customized reports for funders and staff.

Marketing and Outreach

- Draft letters, create flyers and more in English, Spanish or both.
- Customer communications with your organization’s logo.
- Schedule and send follow-up correspondence.

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Foreclosure Mitigation

Enables easily track standard default and loss mitigation activity using NFMC standards.

Granter and Investor Reporting

- Print and export all major industry reports (HUD, NFMC and NeighborWorks® quarterly reporting).
- Automatically generate the required HUD 9902 report.
- Create comprehensive reports using any combination of relevant data fields in the database to tell individual stories.
- Report the activity of affiliates and aggregate the appropriate information through ReportMax, its reporting feature.

About the program

Surviving in today’s environment is an impossibly daunting task. “The program is your very user-friendly, making it easy to access to various useful features.”

CounselorMax™ makes it easy.

If your learning curve is short, intuitive and thoughtfully designed, you will find yourself at home with the system in no time. Should you ever need support, though, prompt technical assistance is never more than an email or phone call away. You can also be confident that all information in the system is extremely secure.

Learn more. Do more.

With everything homeownership counselors are being asked to do, CounselorMax™ is the answer you need to be more professional and effective in your position today, as well as help your clients to a brighter future through homeownership.

For your convenience, a range of managing and productivity reports are now automated at the click of your mouse, and you have full flexibility in tracking client counseling hearts.

"It's all there—view reminders, print reminder letters, view your calendar for the entire month, or develop a custom report for any funner."
outreach materials customized with your logo, in mortgage products. You’ll also be able to generate to qualify for down payment assistance or certain addition to being able to create classes, you’ll manage you from many day-to-day activities. Complete with "Weliketheeaseofenrollingclientsintoclasses."  

A Sign on. Bring big administrative tasks subsidies, track their agencies can customizable you to aggregate data and report on the activity of And for intermediaries, the ReportMax feature allows relevant data fields that is unique to your organization. It is simple to create a report using any combination of reporting tool that is so sophisticated that it makes reporting. Complementing this is a customized Counseling (NFMC) and NeighborWorks quarterly reports are standard in the system, which greatly required HUD 9902 report, now all major industry reporting tool, now even better. 

For both content and accuracy, CounselorMax® tests the standard for quality reporting. Continuously updated to meet regulatory compliance and your clients’ changing needs, CounselorMax® is the client management tool that homeownership counselors can rely on for the long-haul. In addition to automatically-generating the required HUD 1942 report, new all major industry reports are standard in the system, which include: simpliHIC (HUD), National Foreclosure Mitigation Counselor (NFMC) and NeighborWorks quarterly reporting. Complementing this is a customized reporting tool that is so sophisticated that it makes it simple to create a report using any combination of relevant data fields that it is simple to use for your organization. Client intaking, the RepairMax feature allows you to aggregate data and report on the activity of your affiliates.

About CounselorMax
Among the most comprehensive systems of its kind, CounselorMax® is the user-friendly web-based application designed to help homeownership counselors:  

• Create effective outreach campaign quickly and easily  
• Perform intake with minimal effort  
• Maximize efficiency with powerful pre- and post- 
  counseling task tools  
• Save time scheduling and tracking  
• Generate accurate and customized reports for funders and staff

Convenience of the Counselor
Access to any computer with Internet access, residence, or group counseling, including face-to-face, telephone, and easily. Tools such as the compliance administrator allows counselors to better answer clients’ questions and concerns. The system is always maintained for regulatory compliance. CounselorMax data is highly secure. CounselorMax is continuously enhanced to address evolving customer needs and industry demands.

“Client intake activities are performed in real-time. Multiple modes of counseling, including face-to-face, are tracked. Credit reports, which are pre-populated with liabilities, and scores can be easily accessed. Trained, professional staff, which provide peer support to your clients, are also available. The counseling program is very user-friendly with easy access to various useful features.”

 Marks on. Bring big administrative tasks down to size. CounselorMax® may be long in features, but its learning curve is short. Intuitive and thoughtfully designed, most users feel at home with the system in no time. Should you ever need support, though, prompt technical assistance is never more than an e-mail or phone call away. You can also be confident that all information in the system is extremely secure.

Learn more. Do more. With everything homeownership counselors are being asked to do, CounselorMax® is the answer you need to be more professional and effective in your position today, as well as help your clients to a brighter future through homeownership.

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Take productivity to the Max. For minimal cost. Whether being utilized for pre-purchase counseling and education or loan mitigation, CounselorMax® equips you every day and every step of the way. Intake, performed in real-time, becomes effortless. Credit reports are pre-populated with liabilities, and accessing scores is easier than ever. Creating and sharing active plans with clients is simple, too. You’ll also be able to respond to clients’ concerns with convenient tools, such as a built-in amortization schedule. CounselorMax® can save you hours of time and trouble, so you can put every minute of yours to good use.

The industry’s most comprehensive reporting tool, now even better. For both content and accuracy, CounselorMax® tests the standard for quality reporting. Continuously updated to meet regulatory compliance and your changing needs, CounselorMax® is the client management tool that homeownership counselors can rely on for life-long use. In addition to being automatically generated, the HUD 9902 report, now all major industry reports are standard in the system, which greatly simplifies HUD, National Foreclosure Mitigation Counseling (NFMC) and NeighborWorks quarterly reporting. Completing this in a customized reporting tool that is so simplistic that it makes it simple to create a report using any combination of relevant data fields that it is unique to your organization. Yet, by providing the ReportMax feature, allows you to aggregate data and report on the activity of your affiliates.

More functionality = less work. As part of its mission to serve the needs of the counseling industry, NeighborWorks has significantly enhanced CounselorMax® with these added capabilities:

- Loan modification packages, including a standard budget, can be transferred/playback to the Hope LoanPort, an online portal for counselors and servicers to communicate with each other.
- Actions and communications are tracked; for example, there is no concern that a fax was not received.
- Along with customizable monthly and budgetary tasks, you also have a radius of loan-standard budgets, for a total of three distinct budget options.
- A standard loan application (1003) can be exported from the system for use by such tools as lender loan origination systems.

About CounselorMax
Armed with the industry’s most comprehensive reporting system of its kind, CounselorMax® is the user-friendly web-based application designed to help homeownership counselors:

- Create effective outreach campaign quickly and easily
- Perform intake with minimal effort
- Maximize efficiency with powerful pre- and post- loan counseling tools
- Save time scheduling and tracking
- Generate accurate and customized reports for funders and staff
- Extract information at the organization or intermediary level
- Newly automated reporting and the Financial Progress Profile help you tell a compelling story to funders and partners
- Create custom reports using any combination of relevant data fields in the database to tell individual stories
- Report the activity of affiliates and aggregate the appropriate information through ReportMax, its reporting feature

Foreclosure Mitigation
Among the most comprehensive systems of its kind, CounselorMax® is the user-friendly web-based application designed to help homeownership counselors: 

- Create personal loan modification packages to the Hope LoanPort
- Easily track standard default and loss mitigation activity (including type of loan, amount, outstanding balance and primary reason for default) through CounselorMax®’s Default Foreclosure Module's customized guiding and planning work-flow system
- Meet the requirements for NFMC grantees and sub-grantees
- Effectively report default and loss mitigation activity using NFMC standards

Grantor and Investor Reporting
- Print and export all major industry reports (HUD, NFHC and NeighborWorks quarterly reporting)
- Automatically generate the required HUD 1003 report
- Create and manage custom reports using any combination of relevant data fields in the database to tell individual stories
- Report the activity of affiliates and aggregate the appropriate information through ReportMax, its reporting feature

Wellcoming user-friendly, highly secure
CounselorMax® may be long on features, but its learning curve is short. Intuitive and thoughtfully designed, most users feel at home with the system in no time. Should you ever need support, though, prompt technical assistance is never more than an e-mail or phone call away. You can also be confident that all information in the system is extremely secure.

Learn more. Do more. With everything homeownership counselors are being asked to do, CounselorMax® is the answer you need to be more professional and effective in your position today, as well as help your clients to a brighter future through homeownership.

Conveniences for the Counselor
- Accessible from any computer with Internet access, 24 hours a day, 365 days a year
- Calendar function, complete with reminder prompts schedules counselor’s time and clients’ activities
- Newly flexible time tracking functionality ensures that all counseling time is captured

The program is very user-friendly, with easy access to various useful features.

“Client intake activities are performed in real-time.
- Multiple modes of counseling, including face-to-face, are tracked
- Credit reports, which are pre-populated with liabilities, and scores can be easily accessed
- Tri-merged soft credit reports, which prevent adverse impacts to your clients’ scores, are also available
- Tools such as the automated schedule allow counselors to better answer clients’ questions and concerns
- The system is always maintained for regulatory compliance
- CounselorMax data is highly secure
- CounselorMax is continuously enhanced to address evolving customer needs and industry demands
- Exceptional support provided from a highly trained, dedicated team

“Because we care enough to care enough.”

Welcome to CounselorMax. A standard loan application (1003) can be exported from the system for use by such tools as lender loan origination systems.
To homeownership counselors across the country, CounselorMax® is more than just a premier client management tool. It’s the web application built to take the busy work out of your workflow. The most comprehensive system of its kind, it virtually automates education services, scheduling, data collection and more. In just a few clicks, reporting becomes simply more accurate, easily more compelling. Now more advanced than ever, CounselorMax® enables you to more efficiently complete everything you need to do, so you can accomplish what you truly want to do—to make sustainable homeownership a reality for your clients.

“The 9902 is now the easiest report to do.”

Helps me keep track of all of our services for our customers’ records.”

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Explore new features inside

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