

## Firstmark Services – Website Overview Video

Total Run Time: 4:00

FULL TRANSCRIPT (with timecode)

00:00:01:05 - 00:00:10:18

[Voice over] Welcome! Today we're going to walk through how to set up your secure online account and explain some key features of our Firstmark Services website.

00:00:11:02 - 00:00:19:13

[Voice over] To register for an account, visit FirstmarkServices.com, and select "Borrowers" under the "Log in/Register" button.

[Description] User enters FirstmarkServices.com in the address bar. User selects green button labeled Log In/Register then selects Borrowers from the drop-down list.

00:00:20:09 - 00:00:27:17

[Voice over] Click the "Register" button below "Don't Have an Account?" and then enter your personal information.

[Description] User selects white button labeled Register in the box labeled Log In to Your Account. User enters their first name, last name, Social Security number, date of birth, and email address in the fields corresponding to those items.

00:00:28:17 - 00:00:33:10

[Voice over] Next, create your username and password based on the requirements.

[Description] User selects a link labeled Requirements corresponding to the Create Username and Create Password fields, and the requirements of each field are displayed. User enters a username in the Create Username field and a password in the Create Password and Re-type Password fields, then selects the green button labeled Continue.

00:00:34:09 - 00:00:39:02

[Voice over] You'll be prompted to select a security image that will appear each time you log in.

[Description] User selects one of the six possible security images, then selects the green button labeled Continue.

00:00:39:18 - 00:00:44:01

[Voice over] Be sure to verify all your information before continuing.

[Description] User selects two boxes corresponding to text agreeing to website Terms of Use and Electronic Correspondence Agreement. Then the user selects the green button labeled Continue.

00:00:45:06 - 00:00:49:21

[Voice over] Once registration is complete, you'll have full access to your online account.

00:00:50:05 - 00:00:54:03

[Voice over] Starting out on the home page, you'll see a summary of your account.

00:00:54:03 - 00:00:59:13

[Voice over] For an in-depth look at your loan, select "Loan Details" in the top menu.

[Description] User hovers over the button labeled Loan Details in the menu bar.

00:00:59:13 - 00:01:05:03

[Voice over] To explore available payment options, select the "Payments" dropdown in the top menu.

[Description] User selects the button labeled Payments in the menu bar, and a drop-down list displays available options in that menu.

00:01:05:03 - 00:01:17:20

[Voice over] You can make a one-time payment, view your payment history, set up automatic payments, learn about payment relief options, explore co-signer release eligibility, or get a payoff quote.

00:01:17:23 - 00:01:23:10

[Voice over] To find important documentation, select the "Documents" tab in the top menu.

[Description] User selects the button labeled Documents in the menu bar, and a drop-down list displays available options in that menu.

00:01:23:10 - 00:01:30:19

[Voice over] You'll see six options allowing you to view important documents from us or your lender, including your statements.

00:01:30:19 - 00:01:38:21

[Voice over] There's also an Upload Documents feature that allows you to securely send documents electronically and efficiently.

00:01:38:21 - 00:01:44:09

[Voice over] Now that we've walked through the high-level features of the site, let's talk about making payments.

00:01:44:11 - 00:01:47:01

[Voice over] There are two ways to make an online payment:

00:01:47:03 - 00:01:50:05

[Voice over] Click the "Make a Payment" button on the home page,

[Description] User hovers over the green button labeled Make a Payment.

00:01:50:09 - 00:01:54:11

[Voice over] or go to the "Payments" tab and select "Pay Now".

[Description] User selects the button labeled Payments in the menu bar, then selects Pay Now from the drop-down list.

00:01:54:11 - 00:02:01:12

[Voice over] Either option will take you to the Payment Detail page where you can choose to pay by account or by loan.

[Description] User selects the button labeled Pay by Loan, and the loan details display below it. User can enter the payment amount in the Payment Amount field for each loan.

00:02:01:12 - 00:02:10:16

[Voice over] Enter the Payment Amount for your account or pay separately for each loan. If it's your first time here, you'll need to set up your Payment Method.

[Description] User enters the routing number, institution name, and account number in the corresponding fields.

00:02:10:20 - 00:02:16:17

[Voice over] When done, click the "Proceed to Confirmation" button to review the details of your payment.

[Description] User selects the green button labeled Proceed to Confirmation.

00:02:17:01 - 00:02:19:02

[Voice over] Review the Terms and Conditions,

[Description] User scrolls through the Terms and Conditions, then selects the box confirming they have read and agree to the Terms and Conditions.

00:02:20:17 - 00:02:24:18

[Voice over] then click the "Pay Now" button to complete your payment.

[Description] User selects the green Pay Now button.

00:02:25:02 - 00:02:37:23

[Voice over] If you don't have auto debit set up on your account, it's easy to do and helps ensure that your payment is always on time. Simply navigate back to the "Payments" tab and select the "Auto Debit" option.

[Description] User selects the button labeled Payments in the menu bar, then selects Auto Debit from the drop-down list.

00:02:38:11 - 00:02:41:14

[Voice over] Then, select your desired recurring payment amount.

[Description] User can enter the desired payment amount in the Auto Debit Amount field.

00:02:41:23 - 00:02:50:02

[Voice over] To learn more about how payments are applied, take a look at the commonly asked questions on the right side of the screen. Click Continue.

[Description] User hovers over the four expandable questions located below the Auto Debit details box, then selects the green button labeled Continue.

00:02:50:02 - 00:02:56:10

[Voice over] Next, on the eSign page, verify your total monthly amount and Payment Method information.

00:02:56:18 - 00:03:00:08

[Voice over] Read and agree to both the Auto Debit Terms and Conditions,

[Description] User selects the auto debit link and scrolls through the text in the pop-up box that displays the Auto Debit Terms and Conditions, then selects the white box labeled Close.

00:03:01:22 - 00:03:04:08

[Voice over] and the Electronic Signature Agreement.

[Description] User selects the eSign link and scrolls through the text in the pop-up box that displays the eSign Terms and Conditions, then selects the white box labeled Close.

00:03:05:22 - 00:03:09:20

[Voice over] Then, click "Ok, Set Up Auto Debit".

[Description] User selects the box confirming they have read and agree to the Terms and Conditions, which enables the button labeled OK, Set Up Auto Debit. User then selects the green box labeled OK, Set Up Auto Debit.

00:03:10:04 - 00:03:19:12

[Voice over] This takes you to the Receipt page, which summarizes your Auto Debit information and includes the next date your payment will be debited from your account.

[Description] User scrolls through the Auto Debit receipt.

00:03:19:15 - 00:03:22:19

[Voice over] You'll also receive a confirmation email.

[Description] User returns to their account Dashboard page.

00:03:23:13 - 00:03:36:16

[Voice over] Finally, to update your profile settings, such as your contact information, password, or correspondence preferences, select your name in the top menu and choose the option that fits your desired change.

[Description] User selects the button labeled with their name from the menu bar, and the drop-down list displays.

00:03:37:10 - 00:03:58:06

[Voice over] That completes the high-level overview of our website. If you have any questions about your Firstmark Services account, please call us at 888.538.7378 or email us at [Customer.Service@FirstmarkServices.com](mailto:Customer.Service@FirstmarkServices.com). We're here to help.