

LoanPro - Request For Proposal Process

LoanPro provides a Request For Proposal (RFP) process to our Enterprise Clients during the due diligence period. To initiate this process please contact your Enterprise Sales Account Executive and sign the Non-Disclosure agreement, which they will provide. To get an idea what is included in the RFP, see the list below, which is the table of contents of the materials that we will provide.

Table of Contents

- **Company Overview**
 - Contact Information
 - Background
 - Products
 - Our Team
 - Management Team
 - Engineering Team
 - LoanPro Software Product Offering Options
 - Standard
 - Enterprise
 - Limited Financial Disclosure & Related Party Disclosure Notice
- **Software Development & Deployment Processes**
 - Change Management
 - OWASP Guidelines Adherence
 - Environment & Languages
 - AWS Products Utilized
 - Release Process
 - Configuration vs Custom Programming
 - Custom Programming Process
 - Custom Programming Vs API Integration
- **Compliance**
 - PCI-DSS Level 1 Compliant
 - SOC 1 Certified
 - SOC 2 Certified
 - Federal Regulations – APR, TILA, Reg Z, Usury Alerts
 - Collections Compliance
- **Privacy**
 - Security
 - Security Policies
 - Password Security
 - System Access Security
 - System Notes Audits

- Physical Access Security – AWS Data Center – SOC 2 Compliant Data Centers
 - Penetration Testing & Security Reviews, Game Day Drills
 - System Monitoring
 - Operational Risk Management Framework (ORM)
- **API & LoanPro AWS Architecture Design**
 - AWS Architecture Design
 - API
 - Database
 - Supporting Technology
- **Onboarding a New Client**
 - Orientation
 - Discovery
 - API & Third-Party Service Integrations
 - Product Configuration
 - Data Import
 - Historical Import Method
 - Snapshot Import Format
 - Data Import Process
 - Training
 - Final Product Launch
 - Dedicated Onboarding Team
- **Support Options**
 - Free Support Options
 - Paid Support Options
 - Service Level Agreement (SLA) Packages
- **Software Features**
 - Free Trial
 - Live Demonstration
 - Highlighted Features
 - Payment Processing
 - Calculations
 - Reports
 - Variable Context Engine
 - Rules Engine
 - Account Grouping
 - Collections
 - Applications
 - Customer Facing Website
 - Customer Communications
 - Employee & Affiliate Access Management
 - Fraud Tools & Audit Trails
- **Customer References**
- **Appendix**

- Pricing
- LoanPro Software Policies
 - Policy for Safeguarding Private Information
- Secure Payments Policies
 - Privacy Policy
 - Disaster Recovery & Business Continuity Plan
 - Data Backup, Retention, Storage & Disposal Policy
 - Data Security Breach, Incident Response & Escalation Policy
 - Policy for Safeguarding Private Information
 - PCI Service Provider Responsibility Matrix
- Service Agreements
 - LoanPro Software SaaS Agreement
- Certifications/Forms
 - Secure Payments PCI-DSS Level 1 AOC – Security Metrics
 - W9
 - Insurance Policy Declaration Page