

## CASE STUDY

# How Notaroo Helped Allegiant Reverse Services Become Quicker, Smarter, and More Efficient



“The back and forth stuff has been lifted off our backs. Now, Notaroo just... takes care of it. The time-consuming part of the closing process is gone.”

**ADAN GUTIERREZ**

Assistant Vice President, Allegiant Reverse Services

# Client

## **Allegiant Reverse Services (A Division of FNC Title, LLC)**

Allegiant Reverse Services (ARS) was founded in 2016 to continue a tradition of excellence established by its founders — a group of highly-respected and skilled financial professionals who helped pioneer the reverse mortgage industry.

Over the years, the ARS team has advocated for the industry in a highly proactive way, providing education and training for lenders and brokers while efficiently handling the transactions of senior borrowers.

As a result, the team has earned superior trust and established a network of strong connections throughout the United States. In the relationship-driven world of reverse mortgages, that's a unique resource no amount of money can buy.



# Challenges



## Finding, Training, and Managing Good Notaries

Adan Guiterrez is the Assistant Vice President, for Allegiant Reverse Services (ARS) in Roseville, CA. He entered the reverse mortgage industry in 2005, and made it through the 2007 crash before ARS invited him into the title insurance world in 2014.

But like all companies in the reverse mortgage industry, there was a lingering problem... finding good notaries. And if he found one? Managing them during closing added an entirely new layer of complexity and time-sucking back and forth to the equation.

"Anybody can be a notary," he says. "You can be a notary, I can be a notary, anyone. That's why finding notaries with reverse mortgage experience was the biggest obstacle. Because you'd essentially have to Google 'notary in my city' and you'd get 3,000 results. Then you have to call them to see if they have reverse mortgage experience, and if they don't, you're right back at square one again. You just shake your head and move on to the next one. So there are a lot of unknowns when the notary takes the job, and sometimes you just have to hope they'll work out."

**"Once we had a notary, we'd constantly go back and forth explaining over and over and over what they had to do. Because we're different, and the reverse mortgage product itself is different. It ate up all our time during closings."**

# Solutions



## Recommending, Recruiting & Managing Experienced Reverse Mortgage Notaries

Before Notaroo, the same scenario would play out every time...

Adan recalls when “we’d have an inexperienced notary at a reverse closing, almost every time. They always thought they were going to be done in an hour. But after they’re three hours into it - they’d want to scream and walk out. Because they didn’t realize how sensitive it can be with these borrowers. These are seniors, often with medical conditions or complications... and you think you’re going to be done in 30 minutes? No way. That’s why we were always beating our heads on the tables with these notaries.”

The frustration was constant. The stress was evident. And the time spent on educating notaries was astronomical. But then, Adan and the Allegiant Reverse Services team found a better way. They found Notaroo.

Adan remembers it well: “Notaroo comes around and says, ‘Hey, what if we can take care of all that notary stuff for you? Just give us the signing, and we’ll make sure we’re the ones communicating with a notary and managing the whole closing process for everyone involved.’ It was like music to my ears.”

So they gave it a shot. And the change was near immediate. Because after onboarding Notaroo, the back and forth, the micro-managing, the recruiting and explaining how reverse closing worked... was gone. Notaroo brought everyone together, all in one place, and kept everyone on track and informed.

**“Now it’s easy. Our Resware system sends the order via XML and we don’t have to do data entry anymore. It uploads directly to Notaroo and we simply sit back and get notifications. There’s no more chasing data. No more managing. We push to them, they start the process, and they push back the info we need all the way through the closing.”**

# Results



## Information that flows like water (with a lot more transparency)

For Adan and his team, reverse closings aren't something to dread anymore.

Because Notaroo assigns someone from an experienced pool of notaries, onboards them, manages them, and keeps everyone from the lender to title and insurance in the loop.

The best part? It's all in one place.

"Now I don't have to leave my Resware system. I do everything from one dashboard. I request my closing, and Notaroo onboards an experienced notary who I don't have to communicate with ever. I just communicate with Notaroo now. I don't have to worry about it. The simplicity of it can't be overstated."

He doesn't have to call them, teach them, go back and forth with them, or spend 30 minutes on the phone resetting a password for them. These days, Notaroo does all the heavy lifting and the time-sucking black hole of reverse closings is gone.

Adan credits Notaroo with giving them their time back.

"The fact that Notaroo can communicate to us with our own system is powerful - no other client that we have can do that. So that's a big plus. They keep things moving for everyone without even having to email us. It's huge."

As the years have gone on, the relationship between ARS and Notaroo has flourished. Because Notaroo isn't simply a tool or piece of software - it's a permanent solution that ARS sees as part of the team.



**They're a good bunch and I'm proud to be part of their world. Because it's not like they're 'just a notary company.' They're our partners who have changed the way we do reverse closings forever.**





# Notaroo

## Over to You

### Before Notaroo:

Closings are stressful, things fall through the cracks, and it's tough to see where everyone's at.

### After Notaroo:

Everyone and everything is all in one place, communication is flawless, progress is clear, and stress is a thing of the past.



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