ROUND INFINITY

FOR LENDERS, BANKS, BUILDING SOCIETIES AND BROKER NETWORKS

Move your mortgage lending to agentic.

AI agents verify every document, prepare every case and clear every condition. Your underwriters decide.

01 **65% faster origination**

02 **80% faster verification**

03 **85% of queries resolved by AI**



Round Infinity, Inc.

From manual to agentic.

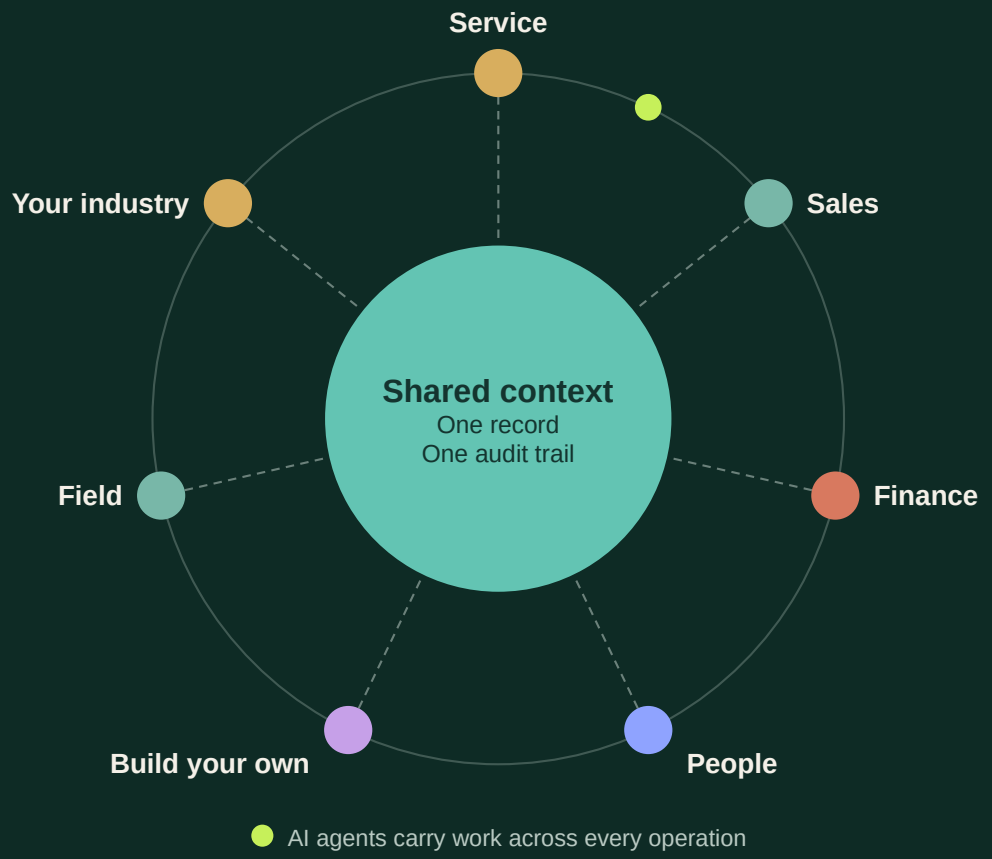
TODAY		WITH ROUND INFINITY
Payslips and statements rekeyed by hand	→	Documents read and checked against the application
Brokers chase the lender for status	→	Status and outstanding items answered on every channel
Conditions tracked in email threads	→	Every condition tracked to cleared, with an audit note
Borrowers remortgage elsewhere at maturity	→	Product transfers offered before the deal ends



Every operation on one shared context.

Your industry's workflows and your core operations run on one shared context. An agent that picks up a task sees every customer, case, contract and payment it touches, and acts across your systems.

One record	Customers, documents and decisions stay connected.
One audit trail	Every action, by an agent or a person, is recorded.
AI agents that act	They prepare, decide within limits and hand off.
People in control	Approvals sit where judgment matters.



One borrower journey, end to end.

Five steps. Pack apps hold the work, AI agents do it, people decide, and a Round Infinity use case completes each step.

01 APPLY

Take every application, direct or broker

AI AGENT

Borrower & Broker Concierge

Explains next steps and collects what is needed.

APP Borrower & Broker Portals

PEOPLE Advisers handle complex cases.

USE CASE **Sales Execution**

02 VERIFY

Verify income, identity and affordability

AI AGENT

Document & Income Verification · Financial Crime

Reads payslips and statements; checks identity and fraud.

APP Affordability & Product Sourcing

PEOPLE Case managers clear flags.

USE CASE **KYC & Onboarding**

03 UNDERWRITE

Prepare the case for the underwriter

AI AGENT

Underwriting Assist · Affordability & Policy

Checks policy and prepares the underwriting summary.

APP Underwriter Workbench

PEOPLE Underwriters decide.

USE CASE **Service**

04 OFFER

Clear conditions and issue the offer

AI AGENT

Conditions & Offer

Chases valuations and clears conditions to offer.

APP Loan File · Valuation Tracker

PEOPLE Underwriters sign off conditions.

USE CASE **Legal Operations**

05 COMPLETE

Complete and keep the borrower

AI AGENT

Completion & Retention

Tracks to completion and offers product transfers.

APP Offer & Completion

PEOPLE Retention teams advise.

USE CASE **Accounts Receivable**

04 UNDERWRITE

Every case, ready to decide.

The Underwriting Assist agent prepares the case with verified figures, risk factors and recommended conditions.

- Verified income and outgoings
- Affordability result
- Policy checks
- Risk factors
- Recommended conditions

POWERED BY

MORTGAGE PACK — Underwriter Workbench · Assist agent

+ USE CASE — KYC & Onboarding

PREPARED BY AI AGENT

Illustrative

Case M-48210 · purchase

Joint applicants · broker case · 80% LTV

INCOME	Verified from payslips and open banking
AFFORDABILITY	Within policy at the stressed rate
CHECKS	Identity, AML and fraud clear
RISK	Recent job change · probation ends in 2 months

RECOMMENDED CONDITIONS

Confirmation of permanent employment before offer

Underwriter decides · conditions tracked to cleared

Six lending agents. Each with a partner.

AGENT 01

Borrower & Broker Concierge

Explains status, outstanding conditions and requests missing documents.

+ Sales Execution

AGENT 02

Document & Income Verification

Reads payslips, statements and IDs; checks them against the application.

+ KYC & Onboarding

AGENT 03

Underwriting Assist

Prepares the case with risk factors and recommended conditions.

+ KYC & Onboarding

AGENT 04

Conditions & Offer

Clears met conditions with an audit note and drafts the offer.

+ Legal Operations

AGENT 05

Completion & Retention

Coordinates completion and offers product transfers before maturity.

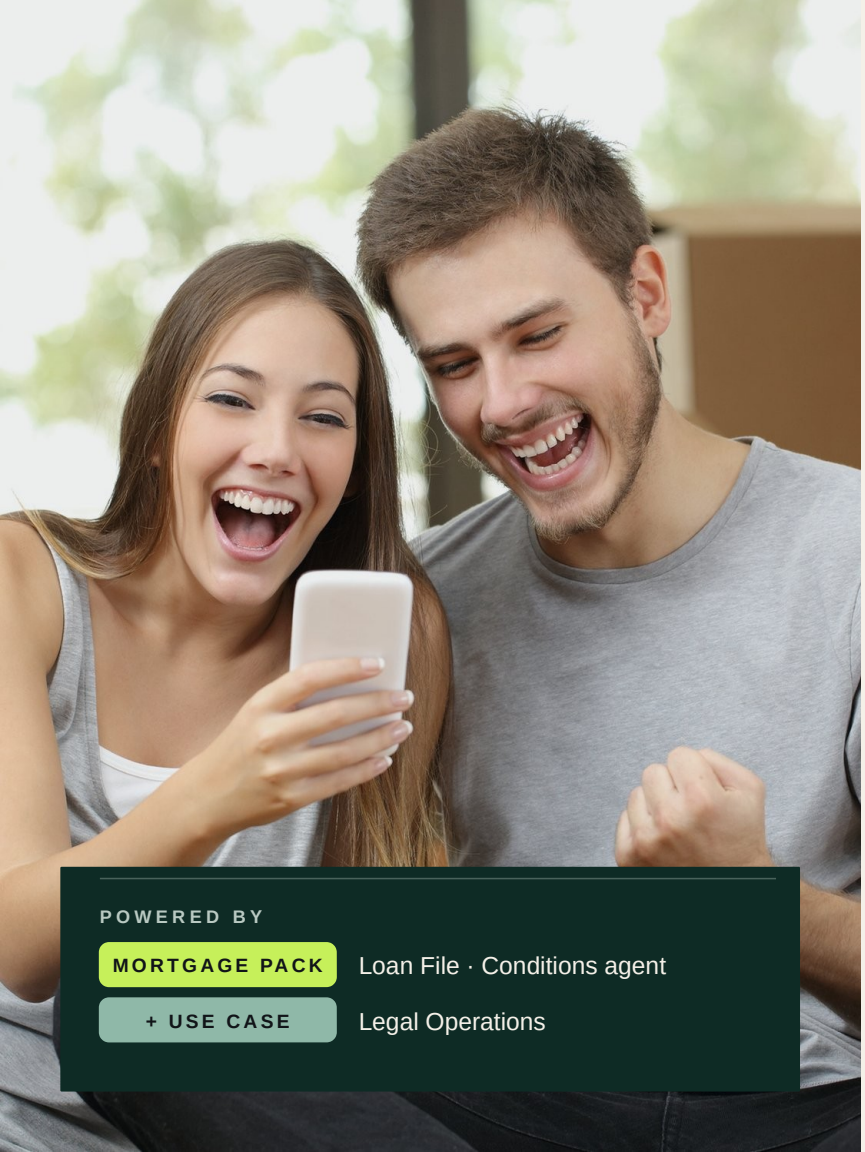
+ Accounts Receivable

AGENT 06

Mortgage Service

Handles calls, WhatsApp, email and chat with summaries and sentiment.

+ Service



POWERED BY

MORTGAGE PACK Loan File · Conditions agent

+ USE CASE Legal Operations

06 OFFER

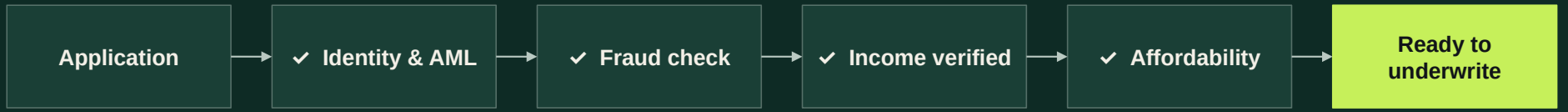
Conditions cleared as documents land.

Documents are matched to open conditions the moment they arrive, and the offer is drafted once all are met.

ACTIVITY · CASE M-48210 *Illustrative*

09:30	BROKER	Uploaded employment letter and bank statement
09:31	AGENT	Matched documents to open conditions
09:31	AGENT	Employment confirmed · condition cleared
09:32	AGENT	Statement is 3 months old · re-requested
11:05	BROKER	Uploaded a current bank statement
11:06	AGENT	All conditions met · offer drafted
14:20	ANALYST	Approved the offer · sent for e-signature

Verified once, checked every time.



Verify

Payslips, bank statements and IDs are read automatically and checked against the application. Identity, AML, sanctions and fraud checks run through your providers; only uncertain cases reach a person.

POWERED BY

MORTGAGE PACK — Affordability · Verification agents

+ USE CASE — KYC & Onboarding

Complete & retain

Completion is coordinated with solicitors. Before a borrower's deal ends, they are contacted with product-transfer options, so they stay with you instead of remortgaging elsewhere.

POWERED BY

MORTGAGE PACK — Offer & Completion · Retention agent

+ USE CASE — Accounts Receivable

Seven applications, built for lending.

Borrower Portal
Apply, upload, track, pay, redemption quotes

Broker Portal
Stage, loan amount and commission status

Loan File & Conditions
Every document, condition and status

Affordability & Product Sourcing
Products, criteria, affordability

Underwriter Workbench
Risk summary, policy checks, decisions

Valuation & Conveyancing
Valuations, reports, solicitor milestones

Offer & Completion
Offer documents, signatures, checklist



Use cases that complete the picture.

All sixteen run on the same record, users and audit trail as the Mortgage pack.

● In the Mortgage pack

FINANCE

● **Accounts Payable**
Broker commissions and vendor invoices.

Procurement
Spend controlled before it is committed

● **Accounts Receivable**
Repayments, arrears and redemptions.

● **Financial Close**
Reconciliations and audit evidence.

PO to Cash
Clean orders, fewer delays

Travel & Expense
Policy enforced before money leaves

CUSTOMERS & REVENUE

● **Service**
Borrower and broker contacts, one case.

Appointment Scheduling
Fuller calendars, fewer no-shows

Field Service
Higher first-time fix, billed on site

● **Prospecting**
Retention and further-advance campaigns.

● **Sales Execution**
Broker and direct pipelines to application.

Online & In-Store Sales
More sales recovered, promises kept

PEOPLE & CONTROL

Recruitment
Faster hiring with explained shortlists

● **KYC & Onboarding**
Identity, AML, fraud and credit checks.

● **Legal Operations**
Solicitor milestones and obligations.

PLATFORM

Build Your Own
From idea to live operation, fast

START WHERE IT HURTS

Pick the operation with the most delay, manual effort, customer friction, control risk or cash impact. Finish it end to end, then add the next.

Tracked from request to done.

WORKFLOWS

DIP to full application	No re-keying between stages
Conditions issue and clearance	Every condition tracked to cleared
Valuation and down-valuation	Instruct, review and re-decide
Product transfer and remortgage	Retention before maturity
Further advance	Re-assess and offer to borrowers
Redemption and servicing	Quotes, payment changes, statements

DASHBOARDS



Pipeline by stage

Applications, offers, completions



Time to offer

By broker, product, underwriter



Outstanding conditions

By type and age

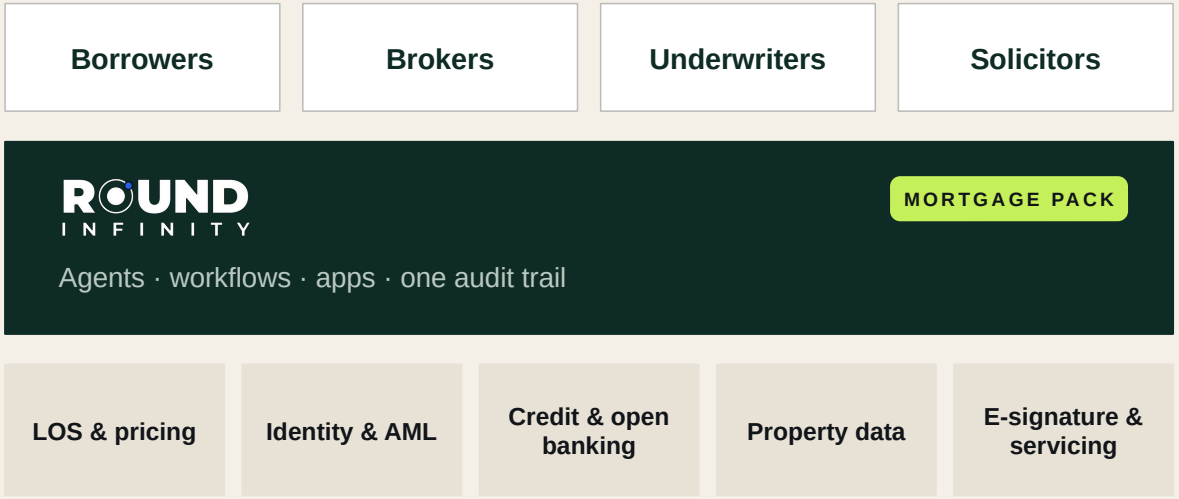


Pull-through and fallout

Where and why cases drop

Works alongside your LOS.

Pricing and disclosures stay in your LOS. Round Infinity runs applications, documents, conditions, valuation and completion around it.



Your systems of record stay where they are

INCLUDED WITH EVERY SUBSCRIPTION

- AI Execution Engine
- AI Agent Builder
- Workflow Automation
- Customer 360
- Apps & Portals
- Integrations & APIs

Price the full journey, not just the pack.

Platform

Named users and the core platform

+

Mortgage Lending pack

Apps, agents, workflows and dashboards above

+

Use cases

KYC & Onboarding · Service · Sales Execution · Accounts Receivable

+

Usage

AI, voice and messaging — pay as you use

One platform, one data model, one user set, one audit trail. The pack and your use cases share all of it.

Price your operation → roundinfinity.com/pricing

ROUND INFINITY

NEXT STEP

See it run on your pipeline.

01	**Walkthrough**	Map applications, verification and conditions
02	**Demo**	See the agents take a case to offer
03	**Quote**	Platform, pack and usage — sized to you

Book a demo →

roundinfinity.com