



# TAILORED BOOKS

## Fractional CFO & Controller Services for Mortgage Banks

At Tailored Books, we specialize in financial clarity and operational control for mortgage banks. Whether you're looking to strengthen your profitability, improve cash flow, or navigate compliance with confidence—we offer white-glove support that fits your needs, not the other way around.

### Industry Expertise You Can Trust

With deep mortgage banking experience, we understand the nuances of secondary markets, pipeline risk, and platform integrations. We know the systems that drive your business—so you're not wasting time explaining them.

### OUR CORE SERVICES

#### Fractional CFO Services ◀

- Strategic financial planning & forecasting
- Budgeting & capital allocation
- Lock rate profitability analysis
- Secondary profitability insights
- Investor and board reporting
- M&A preparation and due diligence

#### Fractional Controller Services ◀

- Financial reporting & month-end close
- Audit prep & compliance oversight
- Accounting policy development
- Cash flow analysis
- Staff training & oversight
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## Helping Mortgage Banks Make Sense of the Numbers

Running a mortgage bank is no small task—tight margins, shifting markets, and layers of financial complexity. That's where Tailored Books comes in.

We provide fractional CFO and Controller services designed specifically for mortgage lenders. Whether you're scaling up or just trying to get a better handle on your numbers, we bring clarity and strategy to your financials.

Here's what we help with:

- Cash flow forecasting that actually means something
- Lock desk and secondary profitability reporting
- Expense analysis to boost your bottom line
- Financial reporting that speaks to both ops and exec teams

### Top Reasons Clients Work With Us

- Mortgage banking specialization
- Proficiency in Encompass and Excel modeling
- Indepth Knowledge of AMB
- Hands-on MSR and gain-on-sale reporting experience
- No bloated firm model—just direct, reliable expertise



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