

ComplyMSA™

VALUE. VERIFY. COMPLY.

The
Marketing Services Agreement
("MSA")
Valuation & Verification Services Model
for the
Settlement Service Industries

MLinc Solutions
A better way to work

MSA Questions?

- Currently setting fees for marketing services performed by business associates without adequate basis or backup?
- Failing to obtain independent validation of the value of services from marketing experts?
- Collecting insufficient input data from business associates and support for activities to justify fees paid?
- Unsure of how to set fees for marketing services performed?
- Uncertain about how you might fare in a CFPB or State audit?
- Lacking the time or resources to implement a valuation methodology?
- Not verifying that contracted services are actually performed each month?

The Valuation Solution

- Introduces use of an independent MSA Valuation Model for setting fees based upon critical factors:
 - Services to be performed
 - Input data from business associates regarding activity levels
 - Benchmarks for cost of marketing impressions from third-party, independent marketing services agencies, experts and media sources
- Works for an array of business associates:
 - Home builders
 - Real estate brokers
 - Relocation companies
 - Community banks
 - Credit unions
 - Professional service groups
 - Others
- Uses a comprehensive, proprietary Model developed by a team of mortgage, RESPA compliance and marketing consultants
- Provides improved basis for initial evaluation, set up and ongoing management of MSAs
- Mitigates risk for all parties to an MSA
- Delivers confidential valuations
- Reflects RESPA Section 8 Regulator interpretations regarding marketing services

Other Services

- Professional Consulting to provide:
 - Review of existing valuation models, processes, documentation and MSAs
 - Development or customization of valuation models
 - “Best Practice” policies, procedures and related tools
 - Independent review of individual MSAs and overall program
- Ongoing Verification Service/Outsourcing:
 - Provides an on-line Service Activity Data Repository platform
 - Collects data, verifies, values and reports actual business associate services completed
- Web Site Advertising services valuations
- Special events sponsorship valuations
- Other advertising custom valuation projects for mall presence, vehicles, magazines, leads, etc.
- Office lease valuations
- Other Services Agreement valuations

Compliance Expertise

- Vast experience across all aspects of mortgage lending and other settlement service industries
- Recognized expert in RESPA compliance
- Industry leader in providing independent affiliated business and services agreement solutions
- Frequent speaker for settlement service industry groups and forums
- Research support from nationally-recognized settlement service industry experts
- Completed thousands of independent, third party MSA valuations for hundreds of clients, including mortgage banks, financial institutions, title companies, home warranty providers, national realty franchisors and real estate brokers

Marketing Expertise

- Experience in marketing and merchandising solutions, including direct sales
- Development and leadership of retailing strategies
- Operations background in media businesses, including print and radio
- Consulting for advertising and public relations companies
- Partnerships with third-party agencies providing skills and experience in brand development, direct marketing, media planning/buying, advertising and design considerations
- Valuation of marketing services performed by real estate companies, home builders, relocation companies, community banks, credit unions, professional service groups and mortgage lenders

MLinc is a nationwide provider of expertise, insight and innovative solutions to the settlement service industries.

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