

Lenders take days to pre-approve. We do it in under 3 minutes.

A live, AI-native mortgage brokerage industrializing a \$2.2 trillion market, backed by the Wingfield Financial operating platform. Raising \$7M to scale nationwide.

\$2.2T
MARKET SIZE

Under 3 min
PRE-APPROVAL

8
STATES LICENSED

24
LENDER PARTNERS

~40%
COST ADVANTAGE

THE PROBLEM

Home financing is broken

Origination is slow, expensive, and manual. It costs the industry roughly \$11,800 per loan on infrastructure built in the 1990s. Borrowers wait and shop elsewhere. Loan officers burn out on paperwork.

THE SOLUTION

The mortgage "easy button"

An AI-native platform built from scratch, not retrofitted. An under 3-minute pre-approval, a 14 to 21 day close, and a target cost of \$6,500 per loan, a structural ~40% cost advantage.

Speed

Under 3-minute pre-approval, not a callback queue.

Real numbers

Your actual loan path, not a rate teaser.

Mortgage Loan Advisor

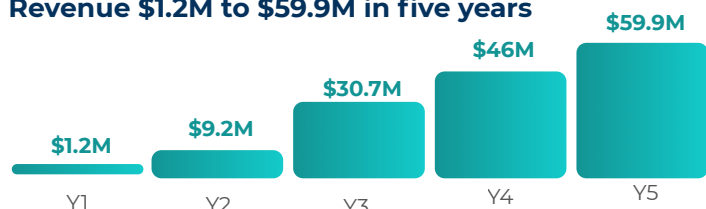
A licensed professional who knows your file.

Plain language

Every term and fee explained before you sign.

THE FINANCIALS

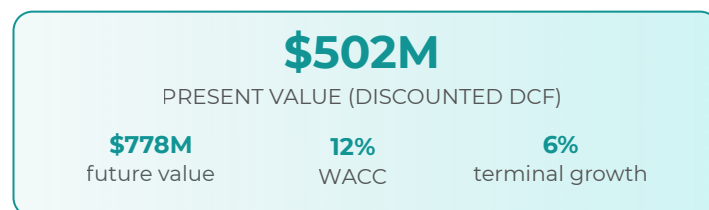
Revenue \$1.2M to \$59.9M in five years



Net brokerage fee. Net cash flow reaches \$38.6M by Year 5.

THE VALUATION

Valued near \$500M today



THE TEAM



John R Clark Jr.
CEO & Founder



Ashley Clark
EVP Origination



Corrie Lawson
EVP Operations

John R Clark Jr. brings 20+ years of mortgage experience and 12+ in finance advisor positions. Backed by Wingfield Financial, whose prior fund (Fund I) has paid investors fixed 10% to 12% annual returns since 2023.

THE ASK · \$7,000,000 · 506(C) · ACCREDITED INVESTORS ONLY

Use of proceeds

65%

Sales & marketing: LO recruitment, borrower acquisition, brand

20%

Working capital: runway to Year 2 profitability

15%

Technology: AI underwriting, title and insurance integration

15%

Annualized ROI, can exceed 20%

7%

Share offered, neg. for Series B

Pref. A/B

Non-voting membership interests

\$502M

DCF present value

Backed by Wingfield Financial, the operating platform behind Momentum Mortgage, owner of the mortgage, restoration, title, and financing companies a deal runs through.

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