

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Your satisfaction is important to us! Please tell us what you think.

Client Survey

NAME: Connie Chong & Frederic Carneiro

FUNDING DATE: 2/17/2012 LOAN AMOUNT: \$328,500

Loan Type: Conventional Purchase

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

NO

2. What suggestions do you have for improving the level of our service?

YOU GUYS WERE ON TOP OF EVERYTHING & COMMUNICATED THOROUGHLY

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

EMAIL IS BEST, BUT PHONE IS FINE TOO.

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

5. Are your phone numbers changing? New home #

NEW HOME # 310-370-7693


6. Would you recommend our team to a friend or relative?

YES, I'M RECOMMENDING YOU TO MY BROTHER & A COUPLE OF FRIENDS

7. Who do you know who is in need of our services at this time?

SEE ABOVE

SIGNATURE



DATE:

3-9-12

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Your satisfaction is important to us! Please tell us what you think.

Client Survey

NAME: Jennifer & Kelly Busby

FUNDING DATE: 10/19/2011 LOAN AMOUNT: \$300,000

Loan Type: Conventional Rate & Term Refinance

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

NO

2. What suggestions do you have for improving the level of our service?

If an important email is sent please call/text if no response is given in sufficient time. Don't so.

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

EMAIL / Text Reminders to call

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

NA

5. Are your phone numbers changing? New home #

NO

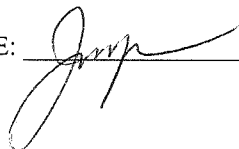
6. Would you recommend our team to a friend or relative?

YES

7. Who do you know who is in need of our services at this time?

I have forwarded your contact info on.

SIGNATURE:



DATE:

11/20/11

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Your satisfaction is important to us! Please tell us what you think.

Client Survey

NAME: Robert & Aleksandra Fliegler

FUNDING DATE: 10/19/2011 LOAN AMOUNT: \$300,000

Loan Type: Cash-out Refinance

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer". 5
- The degree of efficiency & proactive service that you received from his team. 5
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc... 5
- The amount of estimated closing costs vs. what you actually paid. 5
- The level of courtesy from our staff. 5
- The level of efficiency and clarity in getting your questions answered. 5
- The overall experience of working with us. 5

Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

Nothing All was exemplary

2. What suggestions do you have for improving the level of our service?

Clone yourself?

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

email to fliegler@fliegler.net

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

financial planning & tax planning

5. Are your phone numbers changing? New home #

No - same

6. Would you recommend our team to a friend or relative?

yes, send some business cards

7. Who do you know who is in need of our services at this time?

None at this time

SIGNATURE: 

DATE: 10/28/11

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Your satisfaction is important to us! Please tell us what you think.

Client Survey

NAME: William & Claudine Floyd

FUNDING DATE: 9/12/2011 LOAN AMOUNT: \$703,970

Loan Type: FHA Debt Consolidation Refinance

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer". 5
- The degree of efficiency & proactive service that you received from his team. 5
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc... 5
- The amount of estimated closing costs vs. what you actually paid. 5
- The level of courtesy from our staff. 5
- The level of efficiency and clarity in getting your questions answered. 5
- The overall experience of working with us. 5

Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

No (everything was covered)

2. What suggestions do you have for improving the level of our service?

get rid of the mortgage insurance - HAHHA!

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

Contact me right away!

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

No

5. Are your phone numbers changing? New home #

No

6. Would you recommend our team to a friend or relative?

Absolutely

7. Who do you know who is in need of our services at this time?

No one now but I will keep in touch

SIGNATURE: William F. Floyd

DATE: 9-23-11

DAN - THANK YOU SO MUCH. FOR YOUR HELP, THE BONSAI TREE WAS GREAT! YOU ARE SO NICE! YOUR PERFECT TIMING ^{WAS THE REASON} THAT WE GOT THIS APPROVED. YOU'RE AWESOME AND YOU SAVED THE DAY! (AND OUR HOUSE TOO! HAHHA)

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Your satisfaction is important to us! Please tell us what you think.

Client Survey

NAME: Timothy Ogbu

FUNDING DATE: 8/29/2011 LOAN AMOUNT: \$307,014

Loan Type: FHA Purchase

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

NO

2. What suggestions do you have for improving the level of our service?

NONE

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

both phone and email

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

NONE

5. Are your phone numbers changing? New home # 661 673 5907 but I still have my

cellular phone #

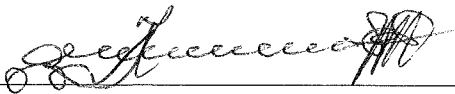
6. Would you recommend our team to a friend or relative?

yes

7. Who do you know who is in need of our services at this time?

none at this time

SIGNATURE: _____



DATE: _____

10/2/11

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Your satisfaction is important to us! Please tell us what you think.

Client Survey

NAME: Andrew Vezina & Shannon Schmier

FUNDING DATE: 8/9/2011 LOAN AMOUNT: \$297,268

Loan Type: FHA Purchase Transaction

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

NO - you guys did an amazing job!

2. What suggestions do you have for improving the level of our service?

NONE

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

email

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

none that we know of

5. Are your phone numbers changing? New home #

we will still have the same cell #s

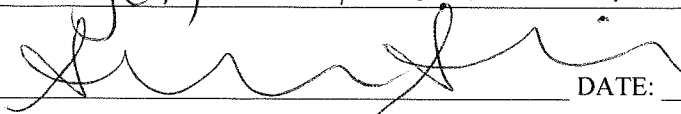
6. Would you recommend our team to a friend or relative?

absolutely!

7. Who do you know who is in need of our services at this time?

No one yet, but we will refer you!

SIGNATURE:



DATE:

8/24/11

Your satisfaction is important to us! Please tell us what you think.

Client Survey

NAME: Himesh Mehta & Vaishali Chhaya

FUNDING DATE: 8/5/2011 LOAN AMOUNT: \$712,050

Loan Type: FHA Purchase Transaction

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

Time-line of closing

2. What suggestions do you have for improving the level of our service?

faster appraisal process

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

Email

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

No

5. Are your phone numbers changing? New home #

No

6. Would you recommend our team to a friend or relative?

Yes

7. Who do you know who is in need of our services at this time?

no one at present

SIGNATURE: Vaishali DATE: 08/29/11

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Client Survey

NAME: Willy & Yuli Espinosa

FUNDING DATE: 7/8/2011 LOAN AMOUNT: \$328,250

Loan Type: FHA Purchase

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

NO, you did everything I asked and more.

2. What suggestions do you have for improving the level of our service?

NONE. you already provide excellent service.

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

E-mail or telephone

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

NONE AT THIS TIME.

5. Are your phone numbers changing? New home #

NO. same phone numbers.

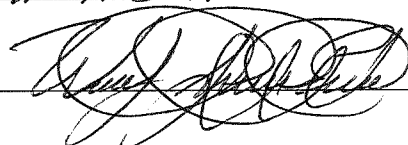
6. Would you recommend our team to a friend or relative?

MOST DEFINITELY.

7. Who do you know who is in need of our services at this time?

NONE AT THIS TIME.

SIGNATURE:



DATE:

07-22-2011

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Rodel Gravo

FUNDING DATE: 3/16/2011 LOAN AMOUNT: \$268,000

Type: Investor Conventional Purchase

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

EVERYTHING I NEED ARE MET PROPERLY.

2. What suggestions do you have for improving the level of our service?

THE LEVEL OF SERVICE ARE VERY GOOD & NOTHING TO IMPROVE

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

VIA E-MAIL OR VIA PHONE

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

MAYBE FINANCIAL PLANNERS IN THE FUTURE.

5. Are your phone numbers changing? New home #

NEW HOME # (661) 977-1565

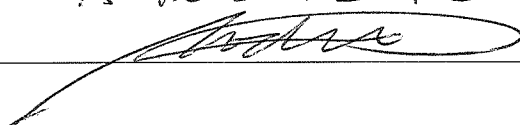
6. Would you recommend our team to a friend or relative?

YES.

7. Who do you know who is in need of our services at this time?

ACTUALLY A FRIEND OF MINE IS THINKING ABOUT GETTING A HOUSE. I MENTIONED DAN SHAPIRO TO HIM.

SIGNATURE:



DATE:

MAY 12, 2011

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Anne Nassour

FUNDING DATE: 3/10/2011 LOAN AMOUNT: \$163,000

Type: Investor Conventional Purchase

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

All questions addressed in a timely manner.

2. What suggestions do you have for improving the level of our service?

None at this time - First experience with your service was excellent!

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

Telephone or email.

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

CPA services in the future

5. Are your phone numbers changing? New home #

home - 805-285-0321

6. Would you recommend our team to a friend or relative?

Most definitely!

7. Who do you know who is in need of our services at this time?

SIGNATURE:

Anne Nassour

DATE:

4-18-11

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Jose & Teresa Alfaro

FUNDING DATE: 12/13/2010 LOAN AMOUNT: \$393,000

Type: Conventional Refinance

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

no

2. What suggestions do you have for improving the level of our service?

it would help to let customer know that does would be sent by email. we don't check email often and frequently happen to check the day it was expire

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

e-mail

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

no thank you.

5. Are your phone numbers changing? New home #

no

6. Would you recommend our team to a friend or relative?

yes

7. Who do you know who is in need of our services at this time?

no one at this time

SIGNATURE: _____

J Alfaro

DATE: _____

1-20-11

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Rosemary Crawford

FUNDING DATE: 12/10/2010 LOAN AMOUNT: \$135,000

Type: Conventional Refinance

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer". _____
- The degree of efficiency & proactive service that you received from his team. _____
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc... _____
- The amount of estimated closing costs vs. what you actually paid. _____
- The level of courtesy from our staff. _____
- The level of efficiency and clarity in getting your questions answered. _____
- The overall experience of working with us. _____

Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

NO

2. What suggestions do you have for improving the level of our service?

you guys are Over Experience

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

I Love it more than anything else.

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

yes in the future.

5. Are your phone numbers changing? New home #

NO

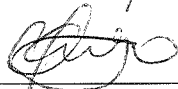
6. Would you recommend our team to a friend or relative?

yes

7. Who do you know who is in need of our services at this time?

no body at this time

SIGNATURE: _____



DATE: _____

2/11/11

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Christopher Laub

FUNDING DATE: 11/3/2010 LOAN AMOUNT: \$325,515

Type: FHA purchase

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

NO, Dan was very thorough

2. What suggestions do you have for improving the level of our service?

/

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

E-mail

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

not currently

5. Are your phone numbers changing? New home #

NO

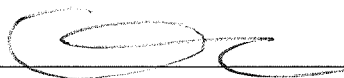
6. Would you recommend our team to a friend or relative?

yes

7. Who do you know who is in need of our services at this time?

Nobody at this time.

SIGNATURE:



DATE:

1-19-11

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Marjorie & Virgil Gines

FUNDING DATE: 10/27/2010 LOAN AMOUNT: \$389,802

Type: FHA REFI

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer". _____
- The degree of efficiency & proactive service that you received from his team. _____
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc... _____
- The amount of estimated closing costs vs. what you actually paid. _____
- The level of courtesy from our staff. _____
- The level of efficiency and clarity in getting your questions answered. _____
- The overall experience of working with us. _____

Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

NONE

2. What suggestions do you have for improving the level of our service?

NOTHING "THE SERVICE WE GOT IS PHENOMENAL"

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

"EVERYTHING" E-MAIL, PHONE + ETC.

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

NOT AT THIS TIME.

5. Are your phone numbers changing? New home #

NO

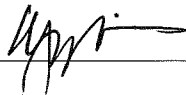
6. Would you recommend our team to a friend or relative?

ABSOLUTELY!

7. Who do you know who is in need of our services at this time?

YES, I HAVE 2 PEOPLE IN MIND AT THIS EXPECT THEIR CALLS!

SIGNATURE: _____



DATE: _____

2-7-11

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Joe & Linda DiMario

FUNDING DATE: 10/13/2010 LOAN AMOUNT: \$135,000

Type: Conventional REFI

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Dan was patient, persistent and kept us posted on progress.

Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

The complexity of applying in today's market.

2. What suggestions do you have for improving the level of our service?

Clearly establishing a checklist of data, materials required.

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

E-mail

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

No

5. Are your phone numbers changing? New home #

No

6. Would you recommend our team to a friend or relative?

Yes. Already did.

7. Who do you know who is in need of our services at this time?

SIGNATURE: Linda H. DiMario

DATE: 11/14/2010

Dan Shapiro

YOUR COMPLETE FINANCIAL
RESOURCE

Customer Survey

NAME: Robert Torres

FUNDING DATE: 10/4/2010

LOAN AMOUNT: \$209,040

Type: VA Streamline
Refinance

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer". 5
- The degree of efficiency & proactive service that you received from his team. 5
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc... 5
- The amount of estimated closing costs vs. what you actually paid. 5
- The level of courtesy from our staff. 5
- The level of efficiency and clarity in getting your questions answered. 5
- The overall experience of working with us. 5

Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

Everything was as expected.

2. What suggestions do you have for improving the level of our service?

None

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

E-Mail

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

No Thank you.

5. Are your phone numbers changing? New home #

No.

6. Would you recommend our team to a friend or relative?

Already have and would so again.

7. Who do you know who is in need of our services at this time?

Nobody at present.

SIGNATURE: Robert Torres DATE: 10/15/2010

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Marilyn Howald

FUNDING DATE: 8/30/2010 LOAN AMOUNT: \$353,478

Type: FHA Streamline Refinance

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

2. What suggestions do you have for improving the level of our service?

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

_____ *email first*

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

5. Are your phone numbers changing? New home #

_____ *no*

6. Would you recommend our team to a friend or relative?

_____ *yes*

7. Who do you know who is in need of our services at this time?

_____ *no one at this time*

SIGNATURE:

Marilyn Howald

DATE:

9/28/10

Dan Shapiro

From: Astin, Regina @ Valencia [Regina.Astin@cbre.com]
Sent: Monday, August 02, 2010 9:41 AM
To: dshapiro@crl1.com
Subject: RE: Thank you!!!

Follow Up Flag: Follow up
Flag Status: Flagged

Oh no!! I hope you are feeling better by now. That stinks.

Yes, thanks goodness we are done with yet another refi! Thank YOU for all your help and concessions that allowed me to get thru it. I think I'm locked in now at the best rate I can possibly get, so while we had a few bumps in the road it was worth it in the end. I appreciate you looking out for me.

So until next time, thanks for everything and I'll keep my fingers crossed that things in the business start turning around for you. :) Talk to you soon.

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Michael Lowther

FUNDING DATE: 7/30/2010 LOAN AMOUNT: \$245,501

Type: FHA Streamline Refinance

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

No

2. What suggestions do you have for improving the level of our service?

None. very satisfied

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

Email

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

None at this time

5. Are your phone numbers changing? New home #

No

6. Would you recommend our team to a friend or relative?

Yes, absolutely!

7. Who do you know who is in need of our services at this time?

No one at this time

SIGNATURE:

Michael Lowther

DATE:

10/20/10

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Nicholas Volz

FUNDING DATE: 5/25/2010 LOAN AMOUNT: \$348,000

Type: Conventional Purchase Transaction

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer". 5
- The degree of efficiency & proactive service that you received from his team. 5
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc... 5
- The amount of estimated closing costs vs. what you actually paid. 5
- The level of courtesy from our staff. 5
- The level of efficiency and clarity in getting your questions answered. 5
- The overall experience of working with us. 5

Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address? DAN kept me apprised of my loan progress and totally met my expectations. He was continually having me send him updated payroll documents so there would be no delays in the end.
2. What suggestions do you have for improving the level of our service? NONE. There were problems involving sellers agent, seller facing foreclosure and escrow but DAN seemed to be the one pulling everything together.
3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)
E-MAIL
4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?
POSSIBLE RE-FINANCE OF ANOTHER PROPERTY.
5. Are your phone numbers changing? New home #
714-328-4551
6. Would you recommend our team to a friend or relative?
YES
7. Who do you know who is in need of our services at this time?
NONE AT THIS TIME

SIGNATURE: Nicholas J. Volz DATE: 6-10-10

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Shannen Le

FUNDING DATE: 5/18/2010 LOAN AMOUNT: \$248,417

Type: FHA Purchase Transaction

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer". 4
- The degree of efficiency & proactive service that you received from his team. 5
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc... 4
- The amount of estimated closing costs vs. what you actually paid. 4
- The level of courtesy from our staff. 4
- The level of efficiency and clarity in getting your questions answered. 5
- The overall experience of working with us. 4

Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

2. What suggestions do you have for improving the level of our service?

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

Email

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

5. Are your phone numbers changing? New home #

No

6. Would you recommend our team to a friend or relative?

Definitely

7. Who do you know who is in need of our services at this time?

SIGNATURE: shle

DATE: 5/28/2010

+
Dan Shapiro
YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Reed Kaelin

FUNDING DATE: 3/19/2010 LOAN AMOUNT: \$475,250

Type: Conventional Refinance Transaction

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

JUST AT FINAL CLOSING - NO ADVANCED NOTICE OF SIGNING - THAT DAY -

2. What suggestions do you have for improving the level of our service?

-0-

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

PHONE / EMAIL

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

-0-

5. Are your phone numbers changing? New home #

NO

6. Would you recommend our team to a friend or relative?

YES: HAVE GIVEN DAN'S # TO 5 PEOPLE SO FAR -

7. Who do you know who is in need of our services at this time?

NATHAN RYAN RAMIREZ

SIGNATURE:

Reed Kaelin

DATE:

3.29.10

9861-298-411

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Chad Weiser

FUNDING DATE: 2/26/2010 LOAN AMOUNT: \$555,555

Type: FHA Purchase Transaction

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

NO

2. What suggestions do you have for improving the level of our service?

EVERYTHING WAS GREAT

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

EMAIL - WEISER5425@GMAIL.COM

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

NO

5. Are your phone numbers changing? New home #

MY CELL IS THE SAME / NO NEW HOME YET

6. Would you recommend our team to a friend or relative?

I ALREADY DID

7. Who do you know who is in need of our services at this time?

MAT HODGES - MAT.HODGES@TMZ.COM

SIGNATURE:

Chad Weiser

DATE:

3/15/10

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Harmony Vezina

FUNDING DATE: 1/4/2010 LOAN AMOUNT: \$176,739

Type: FHA Purchase Transaction

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer". 5
- The degree of efficiency & proactive service that you received from his team. 5
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc... 4
- The amount of estimated closing costs vs. what you actually paid. 5
- The level of courtesy from our staff. 5
- The level of efficiency and clarity in getting your questions answered. 5
- The overall experience of working with us. 5

Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

All of my questions were answered thoroughly. I was treated with respect and friendly attitudes by both Dan and Tracy. I also appreciate their availability and

2. What suggestions do you have for improving the level of our service?

None. I received excellent service throughout the process. willingness to communicate with me during every

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

E-mail

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

no

step of the process.

5. Are your phone numbers changing? New home #

N/A

6. Would you recommend our team to a friend or relative?

Absolutely, I already have.

7. Who do you know who is in need of our services at this time?

no one at this time

SIGNATURE: *Harmony Vezina*

DATE: *1-29-10*

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Arturo Pedroza

FUNDING DATE: 10/14/2009 LOAN AMOUNT: \$119,289

Type: FHA Purchase (short sale)

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

None

2. What suggestions do you have for improving the level of our service?

None

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

E-mail & phone.

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

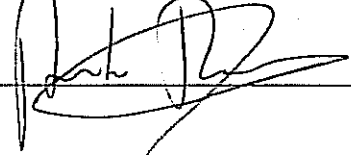
5. Are your phone numbers changing? New home # (562) 531-2088

6. Would you recommend our team to a friend or relative?

Yes!

7. Who do you know who is in need of our services at this time?

Not at the moment

SIGNATURE: 

DATE: 11/13/09

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: John & Patty Dilibert

FUNDING DATE: 9/21/2009 LOAN AMOUNT: \$357,000

Type: Conventional REFI

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

2. What suggestions do you have for improving the level of our service?

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

e-mail

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

5. Are your phone numbers changing? New home #

no

6. Would you recommend our team to a friend or relative?

yes!!

7. Who do you know who is in need of our services at this time?

no

SIGNATURE: Patty Dilibert DATE: 10/28/09

Thank you!!

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Cecilia Marquez

FUNDING DATE: 7/21/2009 LOAN AMOUNT: \$50,400

Type: Conventional Purchase

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

n/a

2. What suggestions do you have for improving the level of our service?

n/a

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

n/a

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

n/a

5. Are your phone numbers changing? New home #

n/a

6. Would you recommend our team to a friend or relative?

yes

7. Who do you know who is in need of our services at this time?

n/a

SIGNATURE:



DATE:

8-25-09

THANKS Dan !! All you did
and Michelle. is appreciated,
Best of luck.

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Robert Torres

FUNDING DATE: 7/15/2009 LOAN AMOUNT: \$208,159

Type: VA Streamline Refinance

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

[Handwritten marks]

Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

NO

2. What suggestions do you have for improving the level of our service?

Everything went smoothly

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

E-mail

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

NO

5. Are your phone numbers changing? New home #

NO

6. Would you recommend our team to a friend or relative?

yes

7. Who do you know who is in need of our services at this time?

NO ONE

SIGNATURE: *Robert Torres*

DATE: 12-31-09

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Laurie Moran

FUNDING DATE: 5/5/2009 LOAN AMOUNT: \$62,594

Type: FHA Purchase Transaction

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer". 5
- The degree of efficiency & proactive service that you received from his team. 5
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc... 5
- The amount of estimated closing costs vs. what you actually paid. 5
- The level of courtesy from our staff. 5
- The level of efficiency and clarity in getting your questions answered. 5
- The overall experience of working with us. 5

Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

You addressed everything and let me know that I can still contact you. Thank you.

2. What suggestions do you have for improving the level of our service?

No suggestions, everything was fine.

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

Email - Laurie.Moran@wholefoods.com

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

No thank you, not at this time.

5. Are your phone numbers changing? New home #

Same number. 310 683-9497

6. Would you recommend our team to a friend or relative?

Yes, in fact I already have recommended you to Arturo Pedrosa.

7. Who do you know who is in need of our services at this time?

My father has contacted you in regards to selling his home.

SIGNATURE: Laurie A. Moran

DATE: 7/15/2009

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Patty Dilibert

FUNDING DATE: 4/3/2009 LOAN AMOUNT: \$91,500

Type: Purchase Transaction

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

no

2. What suggestions do you have for improving the level of our service?

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

E-mail was great.

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

5. Are your phone numbers changing? New home #

no

6. Would you recommend our team to a friend or relative?

yes!!

7. Who do you know who is in need of our services at this time?

SIGNATURE:

Patricia Dilibert

DATE:

04.17.09

Thank you!!

Dan Shapiro

From: Robert J. McGuire [RMcGuire@andrita.com]
Sent: Saturday, March 14, 2009 10:42 PM
To: dshapiro@crlbancorp.com
Subject: RE: loan update

Follow Up Flag: Follow up
Flag Status: Flagged

Hi Dan,

Even when it's done it's not done. It took a locksmith to drill out the lock at the last minute but we finally got into the house. Now that it is really over and we have new keys to a new lock to our new house we can't wait to move in, start personalizing it and make it home.

Thank you so much for your help, Lili and I would have gone crazy without it. It's was great having Kiyo and yourself on our side. We never had to worry about being taken advantage of and in fact we felt completely taken care of. I want to thank you again for locking our rate at 5%. Although I'm sure you can, I cannot even calculate how much we are going to save with that rate but I know it'll be a good amount each month.

Is it possible to get a copy of the appraisal? I am very interested in knowing how well we did (I hope we did well) on our purchase price.

Thank you,
Robert

From: Dan Shapiro [mailto:dshapiro@crlbancorp.com]
Sent: Wednesday, March 11, 2009 3:26 PM
To: tiger_lili@sbcglobal.net; Robert J. McGuire
Subject: loan update

Hi Lili & Robert,

Escrow just called Kiyo and said the seller is review the HUD now. So hopefully they sign off today and fax it back to escrow so we can fund tomorrow morning.

I'll keep you posted,

Dan Shapiro
Senior Loan Officer
CRL

Phone: 714-596-4072
Fax: 714-882-7986

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Michael Lowther

FUNDING DATE: 2/12/2009 LOAN AMOUNT: \$245,471

Type: Purchase Transaction

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?
No
2. What suggestions do you have for improving the level of our service?
None
3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)
Email
4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?
No
5. Are your phone numbers changing? New home #
No
6. Would you recommend our team to a friend or relative?
Yes
7. Who do you know who is in need of our services at this time?
No one

SIGNATURE: Michael Lowther

DATE: 3/20/09

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

Customer Survey

NAME: Suzy Strazzulla & Melissa Pastorino

FUNDING DATE: 1/23/2009 LOAN AMOUNT: \$360,245

Type: Purchase Transaction

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

None Dan was very thorough

2. What suggestions do you have for improving the level of our service?

N/A

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

Email or Phone is fine

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

In the future I am sure

5. Are your phone numbers changing? New home #

NO


6. Would you recommend our team to a friend or relative?

Yes definitely already have

7. Who do you know who is in need of our services at this time?

Co-Worker, suggested Dan if his current does not work out

SIGNATURE:



DATE: 4/1/09

Thank you for everything DAN!

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

16478 Beach Blvd., #299, Westminster CA 92683 - PH: 714.596.4072

Customer Survey

NAME: Regina Astin

FUNDING DATE: 9/2/2008 LOAN AMOUNT: \$367,285

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

No

2. What suggestions do you have for improving the level of our service?

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

email

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

no

5. Are your phone numbers changing? New home #

no

6. Would you recommend our team to a friend or relative?

Definitely!

7. Who do you know who is in need of our services at this time?

No one unfortunately. ☹

SIGNATURE:

Regina Astin

DATE:

9/17/08

Dan Shapiro

From: Astin, Regina @ Newport [Regina.Astin@cbre.com]
Sent: Wednesday, September 10, 2008 4:58 PM
To: dshapiro@ochomeloans.net
Subject: your gift

Hey Dan!

I received your thank you gift today. That was very sweet. You've been a pleasure to work with and I would without hesitation refer someone to you who might be in need of your services. Thanks for all you did to help me get my home. Once things stabilize and the market turns around (and hopefully my home value goes up), I'm sure I'll be in touch about looking for a refi that would eliminate my PMI. Until we talk again, you take care!

Regina Astin | Finance Manager
CB Richard Ellis | Asset Services
111 Universal Hollywood Drive, 27th Floor | Universal City, CA 91608
T 818.907.4617 | C 818.319.3366 | F 818.243.6069
regina.astin@cbre.com | www.cbre.com

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

16478 Beach Blvd., #299, Westminster CA 92683 - PH: 714.596.4072

Customer Survey

NAME: Virgilio & Marjorie Gines

FUNDING DATE: 7/8/2008 LOAN AMOUNT: \$312,000

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

none

2. What suggestions do you have for improving the level of our service?

nothing more to say everything is excellent

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

Everything (E-mail, phone, letter) ASAP!

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

not yet.

5. Are your phone numbers changing? New home # — 1-818-888-6982

6. Would you recommend our team to a friend or relative?

Absolutely w/e I already did!

7. Who do you know who is in need of our services at this time?

One friend is already there "CAROLYN" I'll call!

SIGNATURE: _____

DATE: _____

9-16-08

Dan you're such a blessing to us!
Keep up the good job. God Bless!

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

600 Anton Blvd., 11th Floor Costa Mesa, CA 92626 PH: 714.596.4072

Customer Survey

NAME: Danielle & Jon Roof

FUNDING DATE: 4/25/2008 LOAN AMOUNT: \$218,000

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer". 5
- The degree of efficiency & proactive service that you received from his team. 5
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc... 5
- The amount of estimated closing costs vs. what you actually paid. 5
- The level of courtesy from our staff. 5
- The level of efficiency and clarity in getting your questions answered. 5
- The overall experience of working with us. 5

Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

no

2. What suggestions do you have for improving the level of our service?

—

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

telephone

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

no

5. Are your phone numbers changing? New home #

no

6. Would you recommend our team to a friend or relative?

yes

7. Who do you know who is in need of our services at this time?

—

SIGNATURE: _____

Danielle Roof

DATE: _____

4-16-08

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

600 Anton Blvd., 11th Floor Costa Mesa, CA 92626 PH: 714.596.4072

Customer Survey

NAME: Jay Luckie

FUNDING DATE: 3/25/2008 LOAN AMOUNT: \$303,000

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

NO

2. What suggestions do you have for improving the level of our service?

NONE

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

Phone

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

NO

5. Are your phone numbers changing? New home #

home (562) 498 6891

6. Would you recommend our team to a friend or relative?

YES

7. Who do you know who is in need of our services at this time?

NOBODY

SIGNATURE:

Jay Luckie

DATE:

4/7/08

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

600 Anton Blvd., 11th Floor Costa Mesa, CA 92626 PH: 714.596.4072

Customer Survey

NAME: Daniel & Christine Han

FUNDING DATE: 3/06/2008 LOAN AMOUNT: \$389,405

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

NONE

2. What suggestions do you have for improving the level of our service?

NONE

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

MAIL

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

NONE

5. Are your phone numbers changing? New home #

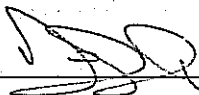
NOT AT THIS TIME

6. Would you recommend our team to a friend or relative?

YES

7. Who do you know who is in need of our services at this time?

SIGNATURE:



DATE:

3/29/08

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

600 Anton Blvd., 11th Floor Costa Mesa, CA 92626 PH: 714.596.4072

Customer Survey

NAME: Cheryl Mosher

FUNDING DATE: 3/5/2008 LOAN AMOUNT: \$273,200

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

Impounds & Escrow Fees were not clear

2. What suggestions do you have for improving the level of our service?

Escrow fees to be broken down

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

Email & phone

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

None

5. Are your phone numbers changing? New home #

No

6. Would you recommend our team to a friend or relative?

Yes

7. Who do you know who is in need of our services at this time?

None

SIGNATURE: _____

Cheryl Mosher

DATE: _____

3/14/08

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

600 Anton Blvd., 11th Floor Costa Mesa, CA 92626 PH: 714.596.4072

Customer Survey

NAME: Kerwin Rice

FUNDING DATE: 2/22/2008 LOAN AMOUNT: \$306,000

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

NO

2. What suggestions do you have for improving the level of our service?

Service was great

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

E-mail

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

N/A

5. Are your phone numbers changing? New home #

NO

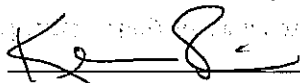
6. Would you recommend our team to a friend or relative?

YES

7. Who do you know who is in need of our services at this time?

NO ONE CURRENTLY

SIGNATURE:



DATE:

3/5/08

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

600 Anton Blvd., 11th Floor Costa Mesa, CA 92626 PH: 714.596.4072

Customer Survey

NAME: Greg Pratt

FUNDING DATE: 1/15/2008 LOAN AMOUNT: \$130,000

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

NOTHING

2. What suggestions do you have for improving the level of our service?

TOUGH TO IMPROVE ON.

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

E-MAIL & PHONE CELL 209-495-9219

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

NO THANK YOU.

5. Are your phone numbers changing? New home #

- NO -

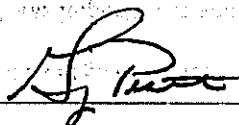
6. Would you recommend our team to a friend or relative?

ABSOLUTELY

7. Who do you know who is in need of our services at this time?

?

SIGNATURE:



DATE:

1-30-08

DAN - MANY THANKS!
-D-

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

600 Anton Blvd., 11th Floor Costa Mesa, CA 92626 PH: 714.596.4072

Customer Survey

NAME: Nancy Kim

FUNDING DATE: 11/20/2007 LOAN AMOUNT: \$75,000

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

WHEN TO EXPECT PAYMENT (COUPONS) FROM LENDER

2. What suggestions do you have for improving the level of our service?

AT SERVICE

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

E-MAIL

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

YOU CAN E-MAIL ME (nancykimkim@yahoo.com)

5. Are your phone numbers changing? New home #

NO

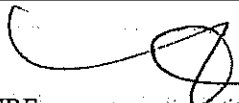
6. Would you recommend our team to a friend or relative?

YES

7. Who do you know who is in need of our services at this time?

ALWAYS PUTTING THE WORD OUT

SIGNATURE:



DATE:

1/31/08

2007



Hope you know
how much
it was appreciated!

Thank you soooooo
very much for all of
your very hard work!!
We love our new home!!

The Bourgeois

Dan Shapiro

YOUR COMPLETE FINANCIAL RESOURCE

600 Anton Blvd., 11th Floor Costa Mesa, CA 92626 PH: 714.596.4072

Customer Survey

NAME: ROBERT & KRISTINA BOURGOIN

FUNDING DATE: 9/18/2007 LOAN AMOUNT: \$324,000

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

10/29/07

Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

NO.

2. What suggestions do you have for improving the level of our service?

Nothing at all. He was GREAT!!

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

E-MAIL.

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

NO thank you.

5. Are your phone numbers changing? New home #

NO.

6. Would you recommend our team to a friend or relative?

Yes!!

7. Who do you know who is in need of our services at this time?

NO one at the moment.

SIGNATURE:

Kristina / Rob Bourgo

DATE:

10/29/07

Dan Shapiro

Customer Survey

NAME: Gena & Cesar Marquez

Please rate us on a scale of 1 to 5 on the following (5 being the best)

1. The levels of financial advice that you received from "Loan Officer".
2. The degree of efficiency & proactive service that you received from his team.
3. The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
4. The amount of estimated closing costs vs. what you actually paid.
5. The level of courtesy from our staff.
6. The level of efficiency and clarity in getting your questions answered.
7. The overall experience of working with us.

5
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5+
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5+

Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

not aware of any

2. What suggestions do you have for improving the level of our service?

can't think of any

3. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

no

4. Are your phone numbers changing? New home #

no

5. Would you recommend our team to a friend or relative?

absolutely!

6. Who do you know who is in need of our services at this time?

not at this time, but I will definitely recommend you!

"We Value Your Referrals"

Thank you for the wonderful gifts!

Dan Shapiro

Customer Survey

NAME: Karel Muns DATE FUNDED: 7/6/2007

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- The levels of financial advice that you received from "Loan Officer".
- The degree of efficiency & proactive service that you received from his team.
- The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
- The amount of estimated closing costs vs. what you actually paid.
- The level of courtesy from our staff.
- The level of efficiency and clarity in getting your questions answered.
- The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

2. What suggestions do you have for improving the level of our service?

Your level of Communications is Excellent!

3. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

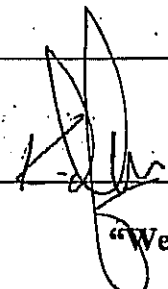
4. Are your phone numbers changing? New home #

5. Would you recommend our team to a friend or relative?

Yes. Done so.

6. Who do you know who is in need of our services at this time?

SIGNATURE



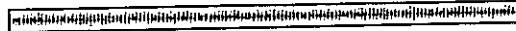
"We Value Your Referrals"

Dan Shapiro

Customer Survey

OUR COMPLETE FINANCIAL RESOURCE
600 Anton Blvd., 11th Floor Costa Mesa, CA 92626

C



NAME: MEREDITH GILSTRUP

Please rate us on a scale of 1 to 5 on the following (5 being the best)

1. The levels of financial advice that you received from "Loan Officer".
2. The degree of efficiency & proactive service that you received from his team.
3. The degree in which we met your expectations on time frames, such as loan approval, closing, etc...
4. The amount of estimated closing costs vs. what you actually paid.
5. The level of courtesy from our staff.
6. The level of efficiency and clarity in getting your questions answered.
7. The overall experience of working with us.

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Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

n/a

2. What suggestions do you have for improving the level of our service?

n/a

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

e mail

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

not @ this time

5. Are your phone numbers changing? New home #

n/a

6. Would you recommend our team to a friend or relative?

yes Jennifer Ayres 1026 393 1120

7. Who do you know who is in need of our services at this time?

"We Value Your Referrals"

Direct Lender

Real Estate Broker, California Department of Real Estate.

Dan Shapiro

From: Dan Shapiro
Sent: Wednesday, April 18, 2007 6:49 PM
To: 'Debbie Baumgartner'
Subject: what Meredith wrote...
Attachments: image001.jpg

Check out what Meredith wrote...

From: Meredith Gilstrap [mailto:meredith_gilstrap@sbcglobal.net]
Sent: Wednesday, April 18, 2007 10:36 AM
To: Dan Shapiro
Subject: Re: Good Faith Estimate

Actually I was thinking last night when Debbie and i were signing this process could not have gone any smoother.

I have heard so many nightmares about re financing and i had a bad experience myself w/ my first loan officer when i bought this place so i was waaaay skeptical going in...hence talking to like 8 different loan people in the beginning - i didnt know who to trust.

But Roberta introduced us quite some time ago and you were very nice, she only knows GREAT PEOPLE so that was huge, and you were the most forth coming w/ all the information and didnt get all weird about answering questions - so this (for me) was a great experience.

My friend maybe refi ing in a few more months and i was going to give her your number if that is okay.

not to get all hallmark or anything but you did make this experience enjoyable and very easy for me.

----- Original Message -----

From: Dan Shapiro <dshapiro@ochomeloans.net>
To: Meredith Gilstrap <meredith_gilstrap@sbcglobal.net>
Sent: Wednesday, April 18, 2007 10:24:31 AM
Subject: RE: Good Faith Estimate

You are not anal at all. In fact you ask very good and relevant questions.

I just want to make sure you're happy. That's my goal beside given you an excellent loan.

Dan

From: Meredith Gilstrap [mailto:meredith_gilstrap@sbcglobal.net]
Sent: Wednesday, April 18, 2007 10:20 AM
To: Dan Shapiro
Subject: Re: Good Faith Estimate

i think it is an awesome loan

i am SUPER STOKED - i am just working out my new monthly budget and wanted to see how much over the min payment on the second i can pay.

i can get anal sometimes - sorry if i came off too strong

Dan Shapiro

Customer Survey

OUR COMPLETE FINANCIAL RESOURCE
600 Anton Blvd., 11th Floor Costa Mesa, CA 92626

C

NAME: CHARLENE YARNO

Please rate us on a scale of 1 to 5 on the following (5 being the best)

- | | |
|--|----------|
| 1. The levels of financial advice that you received from "Loan Officer". | <u>5</u> |
| 2. The degree of efficiency & proactive service that you received from his team. | <u>5</u> |
| 3. The degree in which we met your expectations on time frames, such as loan approval, closing, etc... | <u>5</u> |
| 4. The amount of estimated closing costs vs. what you actually paid. | <u>5</u> |
| 5. The level of courtesy from our staff. | <u>5</u> |
| 6. The level of efficiency and clarity in getting your questions answered. | <u>5</u> |
| 7. The overall experience of working with us. | <u>5</u> |

Please express your honest feelings to the following: It's your feedback that can help my team & I improve.

1. Is there anything that was important to you that we did not address?

None made sure all areas were discussed

2. What suggestions do you have for improving the level of our service?

If you have all "Dans" then you're at the top

3. When we find information that would be valuable to your mortgage plan, how would you like that information communicated? (E-mail, phone, etc...)

e mail please

4. Is there another service that we can provide you with at this time or in the future, CPA's, financial planners, etc...?

Not at this time

5. Are your phone numbers changing? New home #

no

6. Would you recommend our team to a friend or relative?

Absolutely

7. Who do you know who is in need of our services at this time?

no one at this time

"We Value Your Referrals"

Direct Lender

Real Estate Broker, California Department of Real Estate.

Happy New Year
'DANI'

Thank you for every thing
you have done for us. Here
is a small token of Appreciation
from us I hope you enjoy.
Manny & Alma A Guirre

