BoldSign By Syncfusion

Ethical Mortgage

How Ethical Mortgage eSigns Mortgage Documents Faster



Introduction

Jayant Bahel is a mortgage broker in Ontario who has been running his company, **Ethical Mortgage**, on his own for over three years. He works with Canada's top five banks and several other lenders to help his clients secure mortgages for the purchase or refinancing of their homes.

Challenges

As part of the mortgage process, Jayant needs to get a lot of mortgage commitment and disclosure documents signed by clients online. When starting out his business, he consulted the technology review site G2 and tried several e-signing options from its top 10 recommendations. He first tried Adobe Acrobat Signature and Docusign but found them too expensive. He then used the free SignWell for a while, but it limited his signing options and didn't have the functionality he needed.

Solution

Going back to the G2 recommendations, Jayant next tried BoldSign. "When I landed on BoldSign, it just clicked," he said. "You know, it was much more intuitive. The free plan had a lot more signing options a month. So, all those things worked out in my favor, and that's why I continued sticking with BoldSign."

Jayant's favorite feature is the ability to copy fields, like signature and date fields, and paste them wherever he needs in a document. He's turned much of his paperwork into templates and estimates that he's cut the time it takes to build a signing package in half.

BoldSign's security and compliance features also meet the stringent requirements of the highly regulated banks with which Ethical Mortgage works.

Industry
Finance

Product used
BoldSign

Region
Canada

Use case
A mortgage brokerage cut its signature package preparation time in half and got all the features it needed with BoldSign.

> “When I landed on BoldSign, it just clicked. You know, it was much more intuitive.”
>
> **- Jayant Bahel, Mortgage Broker, Ethical Mortgage**

Conclusion

According to Jayant, BoldSign is user friendly, saves him time, and has all the features he needs to replicate documents quickly. He has been recommending the platform to his fellow mortgage brokers.

Want to learn more about BoldSign and try it out for yourself? Start a **free 30-day trial** today or **request a demo**.