



THE BASIS POINT<sup>®</sup>

# STATE OF MORTGAGE FINTECH IN 4 EXAMPLES

APRIL 2026 | JULIAN HEBRON

**THE GATHERING**  
HOUSINGWIRE

**HOUSINGSTACK**  
*LIVE*



# STATE OF MORTGAGE TECH + LIVE DEMOS!

## LATEST CRM, AUS, LOS + LIVE REACTIONS

HOST

**JULIAN HEBRON**

 THE BASIS POINT

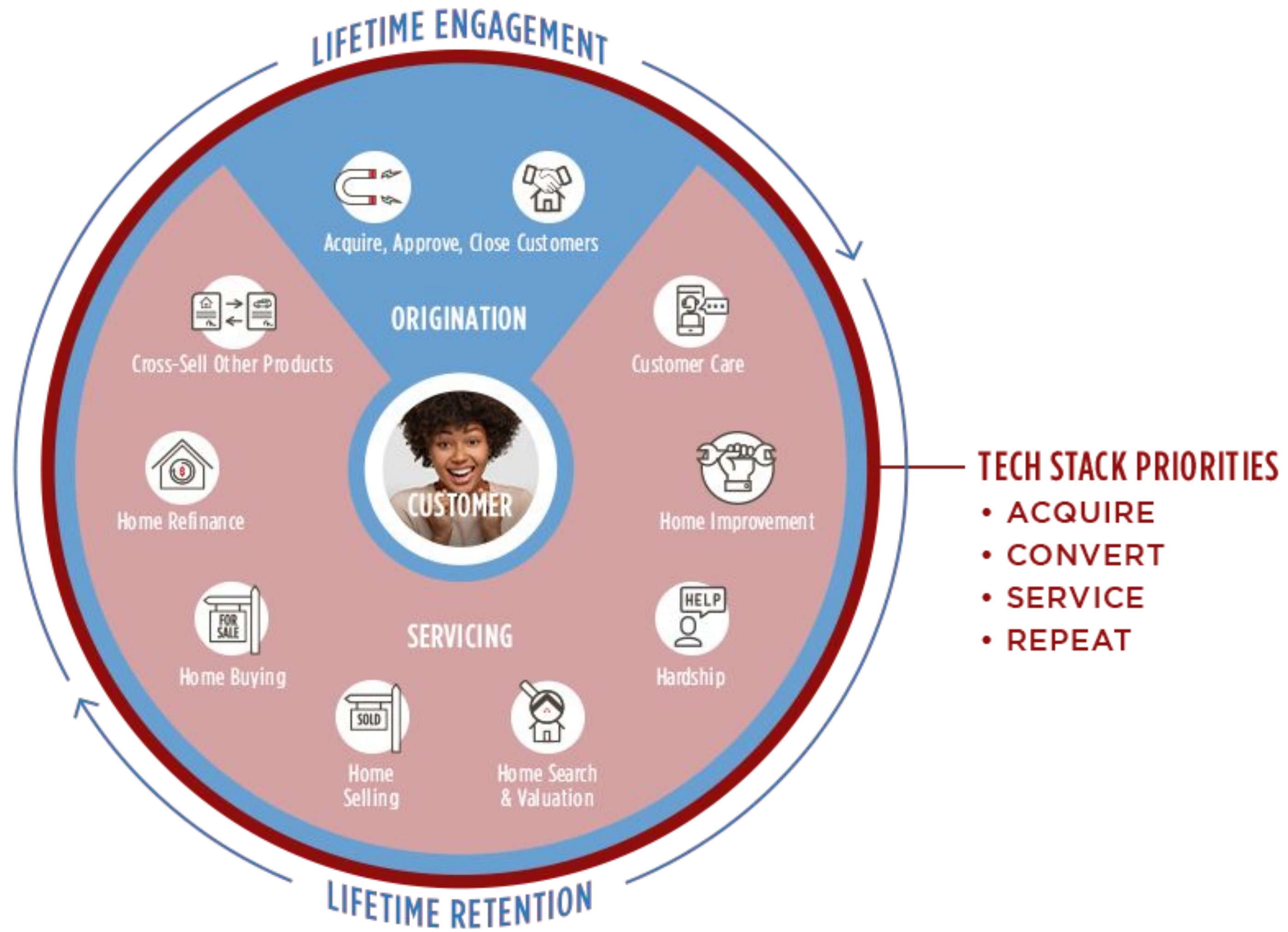
**HW**



  
THE BASIS POINT®



# 4 BASIC TECH PRIORITIES FOR “CUSTOMER FOR LIFE”



The mortgage tech that works best is the tech you actually use.

AI IS MAKING ALL TECH MORE USABLE

**HW**



**AI is crowding an  
already-crowded tech stack.**

**LEGACY ITERATION?  
OR NEW AI-NATIVE?**

**HW**



  
**THE BASIS POINT**

**Myth: Enterprise tech adoption is the key to success.**

**REALITY: TEAMS (ESP LOS)  
USING NEW AI WITHOUT YOU**

**HW**



AI brings a golden age of lender differentiation.

IF LENDERS LET IT PLAY  
... WITH GUARDRAILS

**HW**

+

  
THE BASIS POINT<sup>®</sup>

# IMBs will benefit most in AI differentiation era.

BEING NIMBLE IS WHY IMB SHARE  
GREW FROM 24% IN 2008 TO ~68%

**HW**

+

  
THE BASIS POINT<sup>®</sup>



**PRESTON GUYTON**  
Founder & CEO



AI-Assisted CRM  
For Retail Loan Officers  
(and Realtors!)





**RAHUL PASRICHA**

Sr. Enterprise Acct Exec



MortgageCheck AI  
Workflows For  
Intake, UW, & Servicing





**KAYLA EAMES**  
Product Manager

# TAVANT

Touchless  
Automation for  
Underwriters, LOs, Processors





**CRAIG REBMANN**  
Product Evangelist



Empower  
AI-Powered LOS Platform  
From Interest To Close





AI-ASSISTED CRM FOR  
RETAIL LOAN OFFICERS (& REALTORS!)

**SURE SEND CRM**





**WORKFLOWS FOR  
INTAKE, UW, & SERVICING**

**MORTGAGECHECK AI**



# TAVANT

AUTOMATION FOR  
UNDERWRITERS, LOs, PROCESSORS

TOUCHLESS





AI-POWERED LOS PLATFORM  
FROM INTEREST TO CLOSE

## EMPOWER PLATFORM





thebasispoint.com

@thebasispoint 