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### SAAS – MORTGAGE BANKING & HEALTHCARE MARKETS

Florida

Annual Revenues: \$5,525,000  
Annual Profitability: \$2,101,000

SAAS company that provides a secure cloud-based data and document exchange solution for the mortgage banking and healthcare industries. The company's software allows for seamless data integration and transaction processing between trading partners such as attorneys and mortgage loan servicers in mortgage banking, and radiology, labs, and hospitals in healthcare.

#### KEY ASPECTS

- Unique cloud-based application serving the mortgage banking (90%) and healthcare industries (10%)
- Suite of services focused on managing and routing transactions and integrating data to provide a streamlined system for information exchange
  - Processes over 10 million data and document transactions per month
  - Increased EBITDA margins from 34% in 2015 to 38% in 2018
  - Issued on average \$1.6M in annual dividends from 2015-2018
- Market-leading software application utilized by the majority of top law firms
  - Estimated 99% annual customer retention rate
  - SOC 2 Type II and HIPAA compliant

#### REAL ESTATE

- The company operates from a 12,000 sq. ft. facility leased from an unrelated third-party Management notes there is room to grow in the current facility

#### OWNERSHIP

- The company is owned by eight members, one of which is active in the business. The owners believe the company is in a position where new ownership could leverage its success within the mortgage banking industry to grow its platform within healthcare. The active owner is willing to remain with the company for a transition period

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