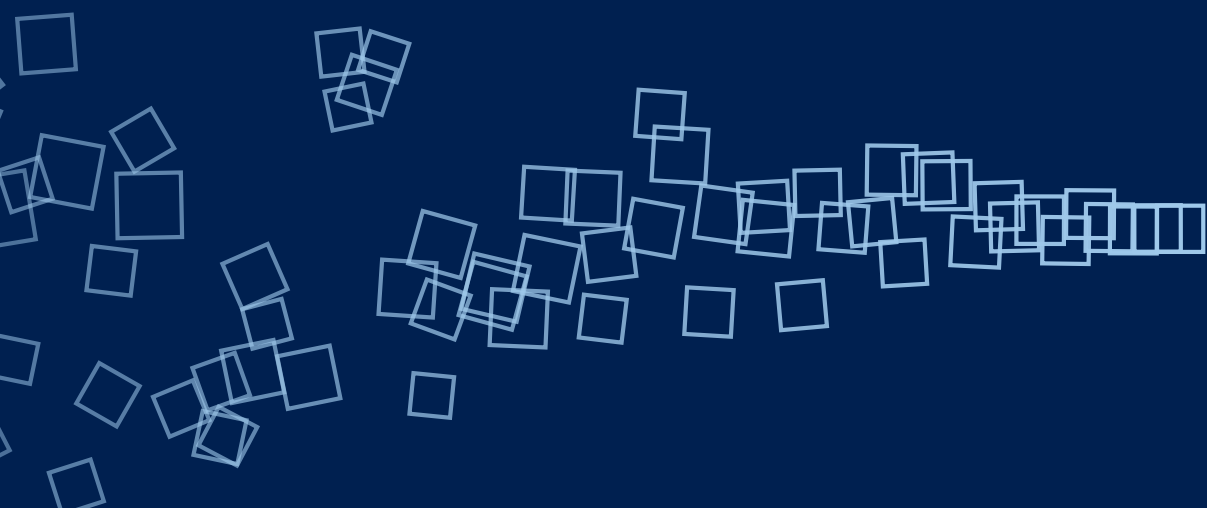




ALL WESTERN MORTGAGE GROWS 50% A YEAR WITHOUT GROWING THE BACK OFFICE

Six people. 100 branches. Over \$3 billion in loans this year.
Here's how their accounting team keeps up.

THE SHORT VERSION

The full story, with Stacy Mohr, CFO of All Western Mortgage, starts on the next page.

The challenge

Growing more than 50% a year on QuickBooks, a generic ledger with no clean path to loan-level reporting, and a six-person accounting team.

The solution

After evaluating AMB, Sage, and other options, AWM chose Loan Vision for its mortgage-specific platform, continuous improvement, and modern tech stack.

The results

Record volume absorbed with one new hire, a month-end close that keeps shrinking, and 75 journal entries reduced to a single import.

Employees

700+

Accounting team

6 people

Branches

100

System replaced

QuickBooks

2026 funding pace

\$3B+

Loan Vision in use

Branch portal, Luna

Results at a glance

75 → 1

Branch reserve entries in a single import

~30 → 22

Days to close — and dropping (target: 10)

+1

Accounting hire as volume scaled (vs. 2–3)

\$300M

First month, with 1,000 units on the horizon

THE CHALLENGE

A lender scaling fast, on a ledger built for general business.

All Western Mortgage has grown more than 50% a year for three straight years — 700-plus employees now, across 100 branches, on pace to fund over \$3 billion in 2026, up from roughly \$2.05 billion the year before. The team responsible for keeping the books is six people. Their tool was QuickBooks.

The problem wasn't just volume, it was fit. QuickBooks is built for general business, not mortgage banking — there was no clean path to loan-level reporting or reconciliation, and none of the industry's particulars (escrow rules, warehouse lines, loan-officer commissions) were understood by the software. As AWM's volume climbed, a generic ledger couldn't keep pace and the team needed to explore a solution that would help with their mortgage financial operations.

"I can say with certainty that QuickBooks could not scale with us the way that we've grown this past year."

Stacy Mohr, CFO, All Western Mortgage

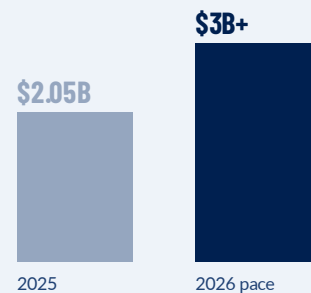
50%+

Growth a year, three straight years

What QuickBooks didn't understand

- Escrow rules
- Warehouse lines
- Loan-officer commissions
- Loan-level reporting and reconciliation

Annual funding volume



6



People keeping the books for 700+ employees across 100 branches

THE SOLUTION

A CFO with 20 years in mortgage accounting, and a platform that speaks the language.

Stacy joined AWM in February 2026 after 20 years in mortgage accounting — much of it on AMB — so she evaluates Loan Vision with a point of comparison few CFOs have. Her verdict is blunt:

“Loan Vision understands the mortgage industry. QuickBooks doesn’t — it’s too generic. It doesn’t understand that escrow funds have different rules, or different processes for loan officers and commissions.”

Stacy Mohr

The AWM team evaluated Loan Vision against AMB, Sage, and other options to find a solution that would work best with their organization as it continued to scale volume. After weighing the options, the team chose Loan Vision for the strength of the platform, the continuous improvement of capabilities, and a forward-thinking tech stack.

“They felt the technology stack was more modern with Loan Vision, and that was important to them.”

Stacy Mohr

Since arriving, Stacy has closed out the last implementation items and moved the account onto a support subscription, kicking off a first system health check to push the setup further. The impact of Loan Vision will continue to grow as more capabilities are introduced to AWM with the help of the team.

20 yrs

Stacy Mohr's experience in mortgage accounting before joining AWM in February 2026

Options evaluated

- AMB
- Sage
- Other options
- Loan Vision

Why Loan Vision

- Strength of the platform
- Continuous improvement of capabilities
- A forward-thinking tech stack

THE RESULTS

Record volume, one new hire

AWM is closing in on its first \$300 million month and 1,000 units, breaking company records nearly every month — and accounting absorbed all of it with the addition of just a single person.

“We added one person this year... Without Loan Vision, I’d probably have to hire two or three.”

Stacy Mohr

Because loan data flows in through standardized imports, a file with 100 loans is no more work than a file with 10 — so the team scales with volume without scaling in size. With all the operational improvements that Loan Vision introduces, there isn’t a need to aggressively build a team to handle all the manual activities.

75 entries become one import

The everyday work tells the same story. Under QuickBooks, even an import was a chore:

“QuickBooks has an import, but it’s more steps and less user-friendly.”

Stacy Mohr

In Loan Vision, the team drops data into a template and posts it in a couple of clicks — so updating loss reserves for every branch becomes one action instead of dozens:

“That wasn’t 75 journal entries — it was one import with Loan Vision.”

Stacy Mohr

Accounting hires this year

With Loan Vision
1 hire



Without
2–3 hires, per Stacy



Updating branch loss reserves



75 journal entries

1 import

A close that keeps shrinking

When Stacy arrived, closing the books took most of a month. It's now down to 22 days and still dropping, with a clear target.

"We're at 25 days; we closed July, and August is slated for 22. I want to get to 10."

Stacy Mohr

With system health checks and new processes being introduced by the Loan Vision team to help AWM get the most out of their solution, they will continue to reduce the month-end close until their target is hit.

Visibility across 75+ branches

The branch portal is the piece the company leans on most — managers pick it up quickly, and finance controls exactly what each person sees.

"The branch portal is by far the most used and most valuable aspect of the software."

Stacy Mohr

Each branch manager can dive into the data as much or little as they want, with all the visibility controls being set by management. With all the options of pre-built reports, it's incredibly easy to start using.

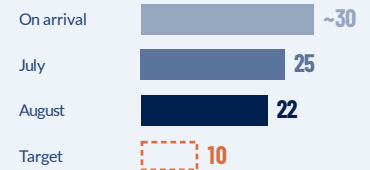
Luna, already earning its keep

Learning a new software sometimes can be a tricky process, but with an AI teammate built into the platform, questions find their answers easily. The team is easily able to avoid delays while learning new capabilities all within the platform.

"Luna has already helped me solve four things without opening a support ticket."

Stacy Mohr

Days to close



75+

Branches with their own view of the numbers, with visibility controls set by management

4

Issues Luna has solved for Stacy without a support ticket

“You wouldn’t think of accounting software as a place to innovate... But that’s what I see Loan Vision doing — when I have a new idea for a feature and say to the team ‘it would be nice to do this,’ you’re already working on it.”

Stacy Mohr, CFO, All Western Mortgage

A partner, not just a ledger

The mortgage industry has often been overlooked when companies look to innovate, but Loan Vision continues to find ways to make it easier to operate as a mortgage professional and increase profitability. With more capabilities on the horizon, the impact to AWM will continue to grow.

LOANVISION

About Loan Vision

Loan Vision is the financial operating platform built for the mortgage industry, helping mortgage banks, banks, and credit unions automate complex financial processes, improve efficiency, and gain greater visibility into their business. Purpose-built for mortgage finance and powered by Microsoft technology, Loan Vision combines loan-level accounting, automation, reporting, and intelligent tools in one platform.

From reducing manual processes to delivering faster access to actionable financial insights, Loan Vision empowers finance teams to work smarter, scale efficiently, and make more strategic decisions. With continued investment in automation and AI, including Luna, our AI-powered assistant, Loan Vision is transforming how mortgage finance teams work while providing the industry expertise, implementation approach, and ongoing support customers need to maximize their technology investment.



Scan to see how Loan Vision works for your finance team

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