PhoenixTeam Capability Statement

PHOENIXTEAM

Founded in 2015, the bedrock of PhoenixTeam is mortgage technology. We are a technology services company with a genAI product arm. We specialize in difficult projects that require diverse teams who know mortgage technology. PhoenixTeam is proud to employ 71 specialized mortgage technology practitioners, with 18.1 years in the trade on average. Our company provides 100% healthcare coverage for employees and their families. We are the exclusive genAI education partner to the Mortgage Bankers Association.

Our Products

Phoenix Burst is a genAI-native technology product designed to fulfill mortgage business processes. Unlike glorified task list "workflow" solutions, our product actually performs work and serves it to a human in the loop for curation.

▶ **Burst for Compliance**: Understand and act upon change in hours, rather than months. We evaluate regulatory and compliance documentation, distill the changes into change statements, assign change statements to teams, and determine impact. We provide the result as a standard format Excel spreadsheet.

▶ **Burst for Software Development**: Either extend our compliance solution or use standalone to accelerate software development. We take compliance change statements or business requirements documents (BRDs) and generate a complete set of requirements, user stories, acceptance criteria, and test cases for immediate curation.

▶ **Burst Enterprise:** Complete the vision of mortgage process fulfillment. This interactive, visual value network connects objectives to radiated insights in a system that continuously scans, predicts, and alerts. This is currently in development.

Our Services

GenAI Services: We help organizations create and execute their genAI strategy. We mine use cases, set up genAI labs, conduct experiments, and deliver genAI solutions to production. We guide clients through every step to ensure genAI delivers return on investment.

Technology Delivery and Transformation: We manage large-scale technology projects and programs. We mitigate project risks, align stakeholders, and ensure timely delivery of mortgage solutions. We specialize in bringing troubled projects back from the brink of failure.

Technology Product Management: We develop and execute product strategies that align with market needs and regulatory requirements. We prioritize user experience, streamline feature development, and drive adoption. We believe in outcomes over output.

Mortgage Data Services: Structuring, validating, and optimizing data architecture and exchanges using MISMO standards. Our services enhance data consistency, enable advanced analytics, and improve interoperability.

Federal and Commercial Mortgage Go-to-Market Support: Guiding mortgage and technology companies through market entry, compliance, and scalability. We help clients refine value propositions, navigate procurement processes, and win new business.

PHOENIX BURST

PHOENIX TEAM

Tela G. Mathias

Tela is the Chief Nerd and Mad Scientist at PhoenixTeam. She is also the Chief Executive Officer of Phoenix Burst. She has 25 years of experience in envisioning and delivering large-scale mortgage technology products. Tela is our strategy ninja and recognized genAI expert. Her superpower is using visualization to communicate the many steps ahead, which she sees intuitively.

Tanya V. Brennan

As the Chief Executive Officer of PhoenixTeam, Tanya connects everyone and everything. She is our resident superconnector and relationship maker, also with 25 years' mortgage technology experience. Tanya's superpower is connecting all the dots and working together with diverse groups of people to get things done. Tanya is a master facilitator and creator.

Thomas H. Westerlind

Yet a third senior executive with 25 years in mortgage technology, Tom is our oak tree. As our Chief Financial Officer and delivery executive, Tom brings a balanced and measured approach to everything, and especially to leadership. Tom's superpower is perspective and technical prowess. He is a master delivery leader with impeccable communication and presentation skills.

Tela, Tom, and Tanya met in 2001 at what was then PricewaterhouseCoopers. They transitioned together from PwC to IBM through acquisition, where the cultural fit wasn't quite right. Tela and Tanya spent almost the next four years serving veterans at the Department of Veterans Affairs (VA) Loan Guaranty Service (LGY) as civil servants where, through the force of sheer will, hard work, and hustle, they worked with Tom and industry to deliver the largest regulatory and technology transformation in the history of LGY.

From there it was time to manage large scale commercial software products with thousands of users. At what went on to become Black Knight Financial Services (now ICE), they managed the wildly successful workflow platform that is now LoanSphere. Within 18 months, they implemented Chase, Wells Fargo, Bank of America, Flagstar, and Vericrest. After a long, circuitous route through acquisitions and mergers, again the cultural fit was not quite right, and they went out on their own to found PhoenixTeam. That was ten years ago.

Talent Spotlight: Representative Phoenicians

Lindsay Bennett, Senior Partner
Product Management, 17 Yrs. Mortgage

Lindsay was our first team member, joining in 2016. Her career as a product manager spans federal and commercial. She led multiple product transformations over her five years as our lead at Rocket Mortgage. She is currently our delivery executive for the Federal Housing Administration (FHA) Catalyst program, modernizing technology infrastructure and streamlining the FHA mortgage lifecycle. Before joining PhoenixTeam, Lindsay held roles at Black Knight Financial Services, IBM, and the U.S. House of Representatives. Lindsay's superpower is her attention to detail enabling her to deliver anything, anywhere.

Becky Griswold, Partner
Data Services, 34 Yrs. Mortgage

Becky joined us in 2019 as an implementation leader and has since led several of PhoenixTeam's most complex federal housing implementations at the US Department of Agriculture (USDA). She is also our partner driving mortgage standardization with the Mortgage Industry Standards Maintenance Organization (MISMO). Prior to joining PhoenixTeam, she mastered mortgage and mortgage data over the course of 27 years at PHH in a wide range of operational and technology leadership roles. Becky's teams are ferociously loyal, supercharging her superpowers in financial and operational data analysis.

Chase Carpenter, Managing Director
Program Management, 16 Yrs. Mortgage

Chase joined the company in 2017. Chase leads all flavors of origination and servicing projects and programs, his work made even more effective by his product management background. Most recently, he led an end-to-end servicing platform build with more than 20 workstreams and 200 team members, with a mix of onshore and offshore delivery teams. At Rocket Mortgage, Chase was the day-to-day delivery leader for multiple mortgage product transformations. Before his tenure at PhoenixTeam, Chase created his foundation in product and project management at Black Knight Financial Services.

Talent Spotlight: Representative Phoenicians

Vicki Withrow, Managing Director
Go-to-Market Support, 17 Yrs. Mortgage

Vicki is also an original team member, joining in 2018. She initially served as a Product Designer and Product Manager on major programs for the U.S. Department of Veterans Affairs Loan Guaranty Service. She later led product and compliance teams for significant commercial mortgage technology clients. She has specific expertise in servicing operations from her time as Default Manager at EverBank. Vicki briefly explored a career in the fashion industry but returned to PhoenixTeam to lead our compliance team.

Nate Pierce, Senior Practitioner
Phoenix Burst, 24 Yrs. Mortgage

Nate's career has been almost exclusively in mortgage servicing technology. He joined PhoenixTeam in 2017. He is the Chief Value Engineer for Phoenix Burst and is accountable for all aspects of product management and delivery. Nate dabbles as a software engineer and has mastered genAI product development, starting his genAI journey the moment ChatGPT hit the mass market.

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DUNS: 092819977 | BUSINESS TYPE: Small

DESIGNATION: Minority, Woman-Owned

CONTRACT VEHICLES: GSA MAS Contract No.47QTCA21D007X

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