

LARGE COMMUNITY BANK

Real Estate Tax Monitoring

BACKGROUND

A large depositor-owned community bank based in Ohio has proudly served its neighborhoods for more than 85 years. While they've grown to almost 20 branches and \$2 billion in assets, they've still maintained a friendly, neighborhood banking experience.

THE CHALLENGE

With all of that growth, the bank struggled to manage paying property taxes in multiple states. Having loans in multiple states has presented a challenge for states in which they cannot access tax information online.

IMPLEMENTING A SOLUTION

To help manage loans in multiple states, the large Ohio community bank turned to Info-Pro's real estate tax monitoring services to make the process much more efficient.

"The tax agency database has been a big help when setting up escrows for construction loans and loans in states where we cannot access information online," according to Rosa, Loan Services Escrow Supervisor.

“Upgrading to the premium service was one of the best decisions we made for our servicing team. This really allowed us to be more confident that tax bills were being paid on time and accurately since Info-Pro essentially does the leg work for us. By simply sending the funds to Info-Pro and them sending off the payments, it also helps when needing to research payment trails.” – Rosa, Loan Services Escrow Supervisor

The servicing team also appreciates that the Info-Exchange site is “user-friendly and easy to navigate,” with a clean layout.

WORKING WITH INFO-PRO

When the bank expressed the need for a more all-inclusive service, Info-Pro developed an in-depth enhancement to its service. “We were immediately met with feedback from the Info-Pro Sales team, and an upgraded service plan was molded to our needs and the needs of the other clients using Info-Pro.”

That same problem-solving enthusiasm continued across the bank’s interactions with other Info-Pro teams. According to the Loan Services Escrow Supervisor, Info-Pro’s Account Management team is “very attentive; they check in but aren’t overly pushy. If we have any concerns or questions regarding our account there is immediate follow-up.”





The bank also experiences that quick follow-up with the Client Services team: "Any time we have needed to reach out, we have same-day follow-up. Even if something may take a little longer to research, there is always communication and updates along the way."

As this large Ohio community bank has grown, Info-Pro has kept up with their needs.

“

Info Pro has a one-on-one feel to their service. One thing my team and I really appreciate is how quickly the turnaround time is for any requests or inquiries we send to the research team, and that we are not emailing an auto-response inbox but an actual team of people.”

Info-Pro
Make work less taxing™

Info-Pro takes “the complex” and makes it easy. We collect and integrate data from the 26,000+ property tax authorities nationwide into a user-friendly software platform, enabling financial institutions to easily identify property tax delinquencies and pay escrow taxes.