Please manage your own email with template and poster pages together when sending out the emails.

1. Cold call to get the **application** (Client will receive the Ref. Number)
2. The processing team ( [**processing@loan-acc.net**](mailto:processing@loan-acc.net)**)** will email you and your manager case created. You will receive a Loan Opinion. (The Processing Team will inform you/your manager how much approximately the client can get. )
3. Discuss Loan Opinion with your client. Discuss the **pre-approved amount** with the client. Agree on retainer & fees. If client Intend to Proceed, email: [billing@loan-acc.net](mailto:billing@loan-acc.net)

EMAIL TEMP:

Sending contract request - Reference Number

Hi Billing Department,

Please send the contract to xxx, email:

Funding specialist name, email

Client retainer pay by check attached or Client would like to pay by card, please also send the payment link to client

Once complete, fill internal portal for this case: https://www.loan-acc.net/internal-portal/funding-department

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_50%\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4. Loan processor will process the loan

Work with the assigned loan processor if they request more documents!

**5. Close** the deal & Funded.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_100%\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Put your exact funded amount on your pipeline.
* Commission sent automatically to you. First time commission might be more than 24 hours.