

Sign In

User Name:

johndoe

Password:

SIGN IN

[Forgot Password?](#)

New User

SIGN ON

LOGO

Search

Message

Account

Home / Loans

Loan List

Filter

Status	Applicant	Application	Principal	Created Date	Action
created	Alice	Sample #1	20,000	2016-07-01	View, Delete
in review	Bob	APP #2	10,000	2016-06-15	View, Delete

Add

LOGO

Search

Message

Account

Home / Messages

Messages List

Filter

Status	From	Created	Content	Related Loan	Action
Unread	System	2016-07-05 12:34 PM	Loan status i s changed	App #2	View, Delete
Read	System	2016-06-15 04:27 PM	New condition is added	App #2	View, Delete

Add

LOGO

Search

Message

Account

Home / Funds

Fund List

Filter

Status	Investor	Application	Amount	Created Date	Action
created	Charles	Sample #1	20,000	2016-07-01	View, Delete
approved	Frank	APP #2	10,000	2016-06-15	View, Delete

Add

Recommanded Fund List

Status	Investor	Application	Amount	Created Date	Action
created	Charles	Sample #1	20,000	2016-07-01	View, Delete
approved	Frank	APP #2	10,000	2016-06-15	View, Delete

LOGO

Search

Message

Account

Home / Account

User Account

Save

Field	Value	Action
Username	Alc	Edit
Password	*****	Edit
Email	alice@sample.com	Edit
Phone	6471234567	Edit
First Name	Alice	Edit
Last Name	Smith	Edit
Address	123 Sample Road...	Edit
Investment Category	Agressive	Assess

LOGO

Search

Message

Account

Home / Loans / Loan Details

Loan Application Details

Delete

Save

Loan Summary

Field	Value	Action
Loan Status	IN REVIEW	Edit
Property Address	123, Sample Road, ...	View
Collected Funds	60,000	View
Loan Amount	100, 000	Edit
Term	12 months	Edit
Loan Purpose	Buy a home	Edit

Business Partners

Role	Name	Address	Action
Applicant	Alice Smith	123 Sample Road, ...	View, Delete
Guarnator	Bob Smith	456 Another St. ...	View, Delete

Add

Subject Properties

Owner	Address	Property Value	Action
Applicant	123 Sample Road, ...	800,000	View, Delete
Guarantor	456 Another St. ...	2,000,000	View, Delete

Add

Conditions

Name	Status	Required	Action
Applicant's Identity	Approved	Yes	View, Delete
Applicant's Employment Proof	In Review	Yes	View, Delete
Guarantor's Property Info	Pending	Yes	View, Delete
Appraisal	Pending	No	View, Delete

Add

LOGO

Search

Message

Account

Home / Loans / Loan Details

Loan Application Details

Delete

Save

continue

Related Funds

Lender	Status	Funds Amount	Action
Charles	Approved	40,000	Edit, Delete
David	In Review	20,000	Edit, Delete

Add

Scheduled Payments

Date	Amount	To	Status	Action
2016-10-01	1,000	Charles	Complete	Edit, Delete
2016-10-02	1,000	David	Scheduled	Edit, Delete

Add

Attachments

File Name	File Type	Description	Created Date	Action
Commitment	PDF	Ready for client review	2016-07-01 02:03 PM	Edit, Delete
Gift Letter	WORD	Template for download	2016-03-02	Edit, Delete

Add

Comments

Content	Author	Created Date	Actions
one question for the application	Alice	2016-07-01 02:03 PM	Edit, Delete
fyi....	Frank	2016-05-02 03:04 PM	Edit, Delete

Add

LOGO

Search

Message

Account

Home / Loans / Loan Details / Partners / Partner Details

Business Partner Details

Delete

Save

General

Field	Value	Action
Role	Applicant	Edit
First Name	Alice	Edit
Last Name	Smith	Edit
Date of Birth	1950-01-23	Edit
Legal Status	Permanent Resident	Edit
Marriage Status	Married	Edit
Dependents	1	Edit
Investment Category	Conservative	Edit

Contacts

Field	Value	Actions
Phone	6471234567	Edit, Delete
Email	alice@sample.com	Edit, Delete

Identity

Identification Type	Document No.	Actions
SIN	1234567892	Edit, Delete
Passport	ABCDEFGE	Edit, Delete

Add

LOGO

Search

Message

Account

Home / Loans / Loan Details / Partners / Partner Details

Business Partner Details

Delete

Save

-----continue-----

Address

Address	Curr. Addr.	Bill Addr	Ship Addr	Actions
123 Sample Road...	Yes	Yes	Yes	Edit, Delete
789 Prvious Str...				Edit, Delete

Address #1

Field	Value	Actions
Unit/Suite #	202	Edit
House #	233	Edit
Street	Sample Road	Edit
Street line 2		Edit
City	Toronto	Edit
Country	Canada	Edit
Province	ON	Edit
Years at this Addr.	2	Edit
Is Curr. Addr	Yes	Edit
Is Billing Addr	Yes	Edit
Is Shipping Addr	Yes	Edit

Add

LOGO

Search

Message

Account

Home / Loans / Loan Details / Properties / Property Details

Subject Property Details

Delete

Save

General

Field	Value	Action
Owner	Applicant	Edit
Date of Purchase	Alice	Edit
Property Address	Smith	Edit
Annual Property Tax	1950-01-23	Edit
Mortgage Balance	60,000	Edit
Monthly Payment	alice@sample.com	Edit

Address

Field	Value	Actions
Unit/Suite #	202	Edit
House #	233	Edit
Street	Sample Road	Edit
Street line 2		Edit
City	Toronto	Edit
Country	Canada	Edit
Province	ON	Edit

LOGO

Search

Message

Account

Home / Loans / Loan Details / Conditions / Condition Details

Condition Details

Delete

Save

General

Field	Value	Action
Name	Applicant's Identity	Edit
Status	Pending	Edit
Description	Any of Driver's Licence, NOA, T4, and SIN Card	Edit

Attachments

File Name	File Type	Description	Created Date	Action
Driver's Licence	PDF	Photocopy	2016-04-01	Edit, Delete
T4	PDF	Photocopy	2016-05-02	Edit, Delete

Add

Comments

Content	Author	Created Date	Actions
T4 has been uploaded	Alice	2016-07-01 02:03 PM	Edit, Delete
Get it. Thanks.	Frank	2016-05-02 03:04 PM	Edit, Delete

Add

LOGO

Search

Message

Account

Home / Loans / Loan Details / Funds / Fund Details

Fund Details

Delete

Save

Fund Summary

Field	Value	Action
Status	APPROVED	Edit
Rate of Return	4.0 %	Edit
Fund Amount	100,000	Edit
Term	12 months	Edit

Business Partners

Role	Name	Address	Action
Investor	Frank	78 Angel Dr...	View, Delete
Investor	Charles	90 Evil Blvd...	View, Delete

Add

Conditions

Name	Status	Required	Action
Consultant Agreement	Approved	Yes	View, Delete
Risk Disclosure	In Review	Yes	View, Delete
Loan Agreement	Pending	Yes	View, Delete
Register Document	Pending	Yes	View, Delete

Add

Attachments

File Name	File Type	Description	Created Date	Action
Risk Disclosure	PDF	Ready for client review	2016-07-01	View, Delete

Add

Comments

Content	Author	Created Date	Actions
money has transferred	Alice	2016-07-01 02:03 PM	View, Delete

Add