Gee∞Goals

Onboarding Questions:

Name

Last Name

Bank Website

Email:

LinkedIn Profile

Financial Product you would like to represent:

Time for a call back.

Gee∞Goals

- My Profile
- My leads
- My Reviews
- Events
- Prospecting
- Support

Log out

3 Steps with No Sensitive Data Submission

1 ———————— **2** ———————— **3**

Tell us more about you:
Share why you started your career in banking, hobbies, and something unique about you.(Whatever you feel comfortable sharing)

Upload 1 Professional Picture:Upload button

Upload 2-3 Pictures not work related for the about you section: (Optional) Upload button

Upload bank logo: (upload button)

Type bank website:

Language(s) Spoken Fluently: (List options of languages)(Multi-selection)

Choose the use of funds available for the Financial Product that you'll be representing

Working Capital	Build Business Credit	Business Acquisition	Start-up Capital
Business Expansion	Purchase Inventory	Purchase a Franchise	Construction
Operating Capital	Equipment/Machinery	Partner Buyout	Leasehold Improvement

Type of Financial Institution: National Bank, Regional Bank, Community Bank, MDI, CDFI, Credit Union, Online Lender)

GeeOoGoals

- **My Profile**
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Log out

3 Steps with No Sensitive Data Submission

1 — **2** — **3**

This Section should recreate the forms that we have inside Wix, which is technically all the underwriting for each financial product.

Gee∞Goals

- My Profile
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Log out

Financial Product: **Bank Line of Credit**

Stages:
- Connecting
- Initial Docs.
- Additional Docs
- Underwriting
- Waiting on Decision
- Feedback
- Approved

Availability:
- 🟢 Online
- 🔴 Off

Notifications:
ON

Dates
- Month to Date
- Quarter to Date
- Year to Date

Business Owner
Connecting   2
Chat
My Financial profile
🟢 Availability
Industry: Hospitality

Business Owner
Connecting   1
Chat
My Financial profile
🟢 Availability
Industry: Hospitality

Business Owner
Connecting   4
Chat
My Financial profile
🔴 Availability
Industry: Hospitality

Business Owner
Connecting   3
Chat
My Financial profile
🔴 Availability
Industry: Hospitality

Gee∞Goals

- My Profile
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Log out

← **Back**

Status Chat

Name , Last

My Financial profile

Industry: Hospitality

🟢　🔴　Business name: Coffee Rio

Change Status to:

- **Connecting**
- Initial Docs.
- Additional Docs.
- Underwriting
- Waiting on Decision
- Feedback
- Approved

Interactions

Business Owner: Hi Mauricio, it looks like we matched, truly pleasure to meet you, I would like to know more about opening an account with your bank.

Banker: Hi Jhoni I am happy to share more about the line of credit with you, what specific questions do you have?

Business Owner: What's needed to start the process?

Banker: We need, DL, SSN, SBA 1919 but you can drop everything here: banker link

Okay

GeeooGoals

Connect Meet-Up Api to this tab for meet the Bankers

Benefits as Banker
Visibility
Industry-Expert
Differentiate Yourself
 More fancy stuff

Would you like to host one of our event send us?
Fill out this form: (Microsoft forms)

Gee∞Goals

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Log out

We would love to get your opinion on the Matter

We are thinking of developing a tool that would allow you to prospect clients based on Industry, Revenue and Location.

Will you use this feature: Yes No
Why?

GeeᴏᴏGoals

My Profile

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Log out

Support

Company Hours: 8-5pm Nah just kidding just don't call after 10 pm,

Email: support@geegoals.com

Phone: 714-984-3163

Chat :

Help us create a more personalized platform and give us feedback
Tell us what else would you like to see,
How can we improve our services.