

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



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



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









My Reviews



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3 Steps with No Sensitive Data Submission



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









My Reviews



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Financial Product: Bank Line of Credit

Stages: Connecting Initial Docs. Additional Docs **Underwriting**

Waiting on Decision

Feedback

Approved

Availability:







Online

Off

Notifications:



Dates

Month to Date

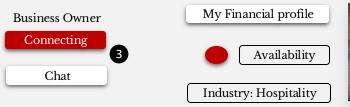
Quarter to Date

Year to Date













Status Chat



My Profile



My leads



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Change Status to:

Connecting

Initial Docs.

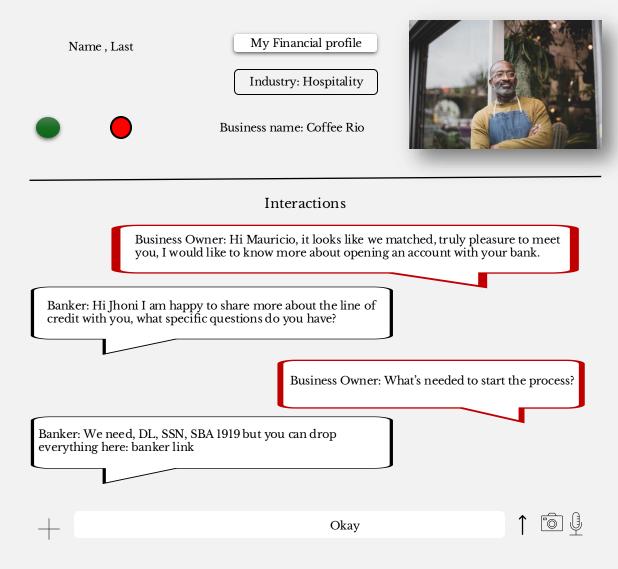
Additional Docs.

Underwriting

Waiting on Decision

Feedback

Approved











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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)









My Reviews



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Support

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?



Support



My Profile





My Reviews



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Support

Log out

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.