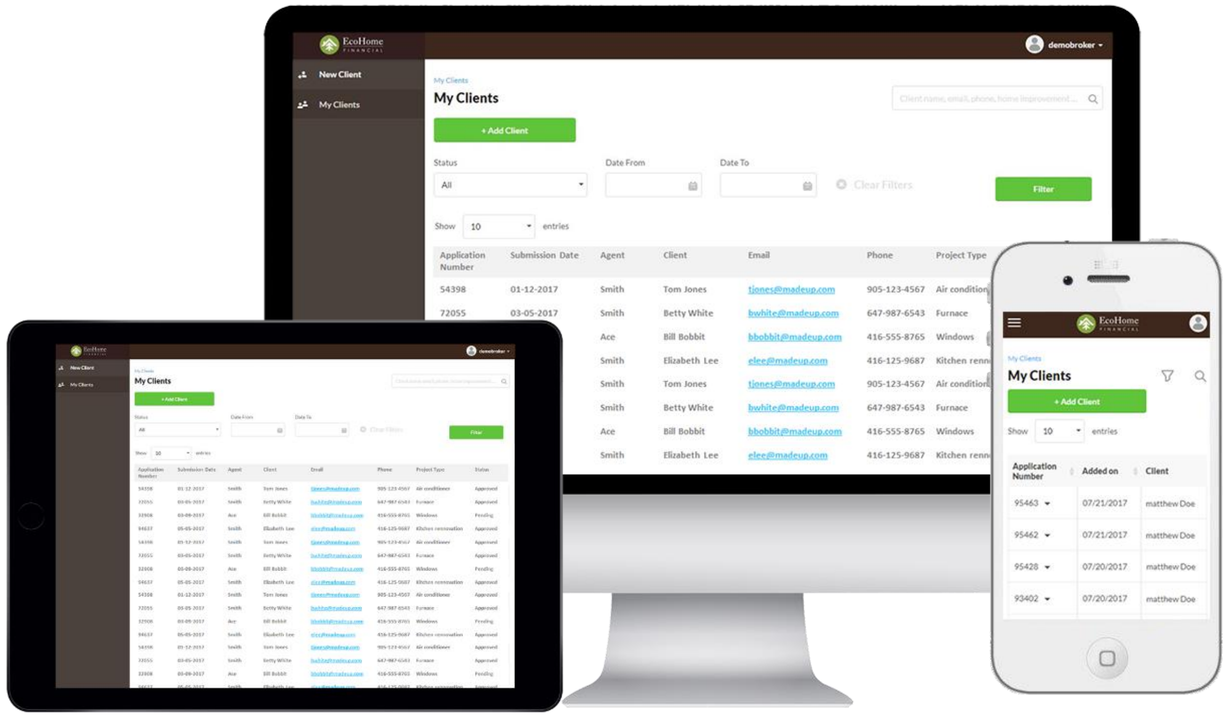
Mortgage Broker Portal

User guide

February 2018 version



EcoHome FINANCIAL

Engagement-Powered Consumer Financing

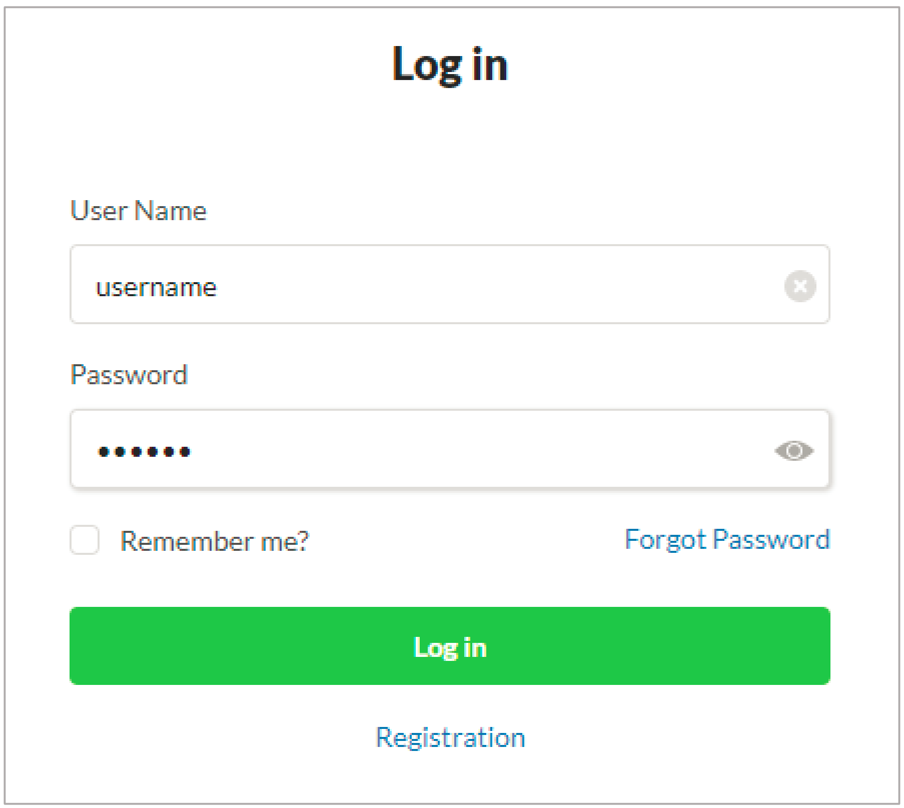
Your login credentials would have been provided to you by your Account Manager. If at any time you forget your password or have locked your account you can contact Support at 1-866-382-7468 ext.3 to have it reset

STEP 1:

Visit the following URL: **https://beta.ecohomefinancial.com/mortgagebrokers/**

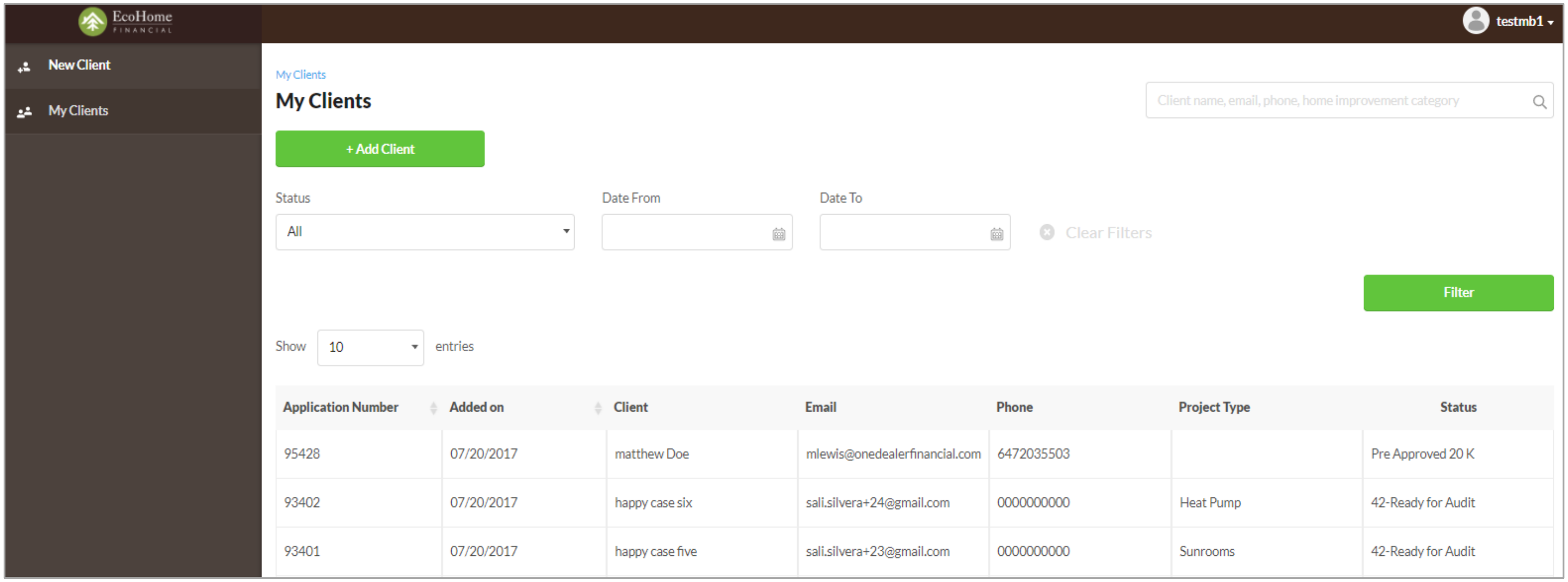
STEP 2:

Enter your username and password on the Log In page



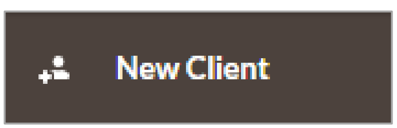
STEP 3:

You will be directed to your Dashboard upon successful login



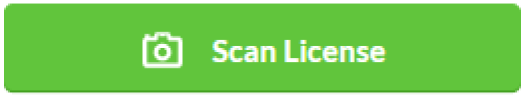
STEP 4:

Click on ‘New Client’ in the Menu on the left side of the screen OR click on the ‘+ Add Client’ icon at the top of the screen

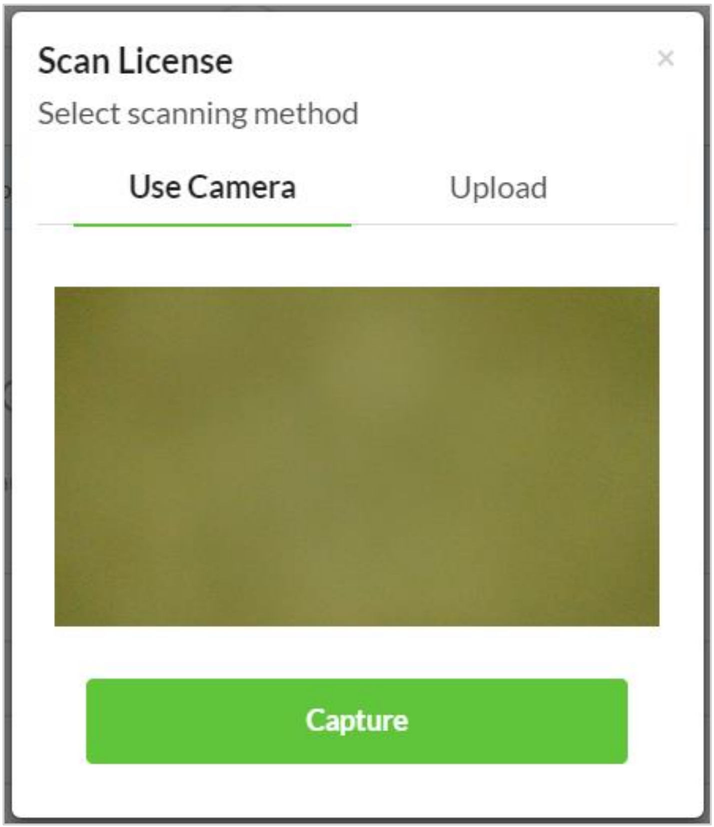


STEP 5:

Complete the Client Information section. Click the ‘Scan License’ button



The following will appear to allow you to capture the driver’s license barcode



Mobile users click ‘Capture’
Desktop users click ‘Upload’
Sample image of back of Driver’s License:

To scan the driver’s license, turn the license over to scan the barcode on the back of the license. Avoid any glare and turn off your flash

STEP 6:

If drivers license is not available to be scanned enter the following information in the Client Information section:

a) First Name
b) Last Name
c) Date of Birth

STEP 7:

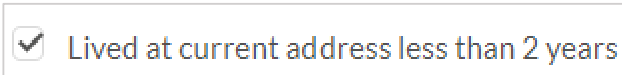
Complete the Address Information section. This is for the Clients current address. Enter/complete the following information in the Address Information section:

a) Address
b) Unit #
c) City
d) Province
e) Postal Code

1. At least one of the applicants must be the home owner
2. Postal code is a minimum of 5 characters and maximum of 6 characters

STEP 8:

If the Client has lived at their current address for less than 2 years, click the check box as per below in the form to complete the Customers previous address



Enter/complete the following information in the Previous Address Information section:

a) Address
b) Unit #
c) City
d) Province
e) Postal Code

STEP 9:

Complete the Contact Information Section.

Complete/enter the following information in the Contact Information Section:

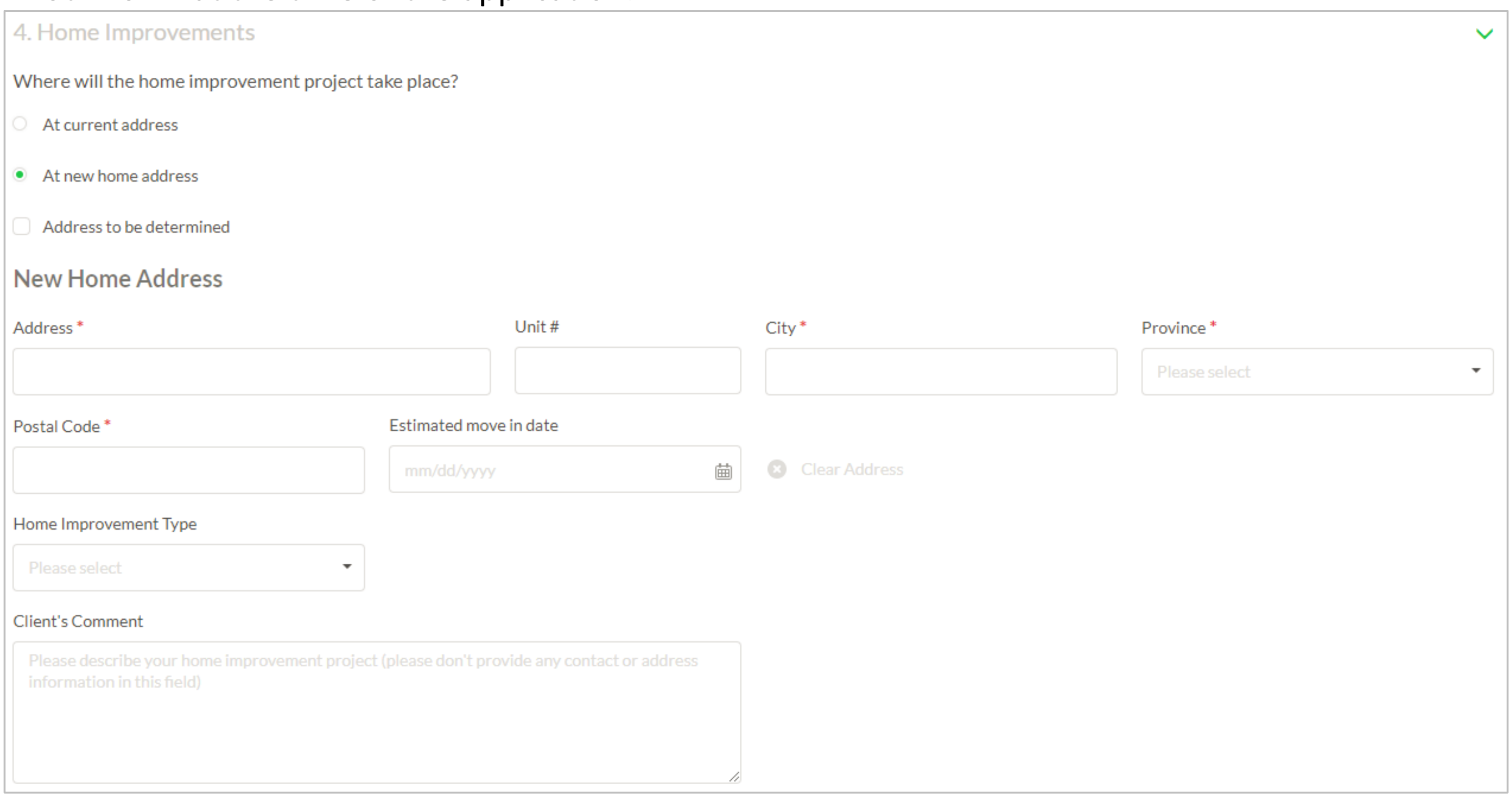
a) Home Phone
b) Cell Phone
c) Business Phone
d) Email Address

STEP 10:

Complete the Home Improvement Section. Select if the home improvements will take place at the current address or at a new home address. If at a new home address, complete/enter the following information:

a) Address
b) Unit #
c) City
d) Province
e) Postal Code
f) Estimated move in date
g) Home Improvement Type

The above fields are not mandatory and can be provided by the Client at a later date to EcoHome Financial if it is not known at the time of the application.



STEP 11:

The Customer must read and authorize their credit report to be pulled, and provide consent to receive electronic communications from EcoHome Financial. This must be completed by the Client.

☑ By submitting this application, you acknowledge and agree that EcoHome Financial is authorized to obtain your credit report from one or more consumer credit reporting agencies (e.g. Equifax or TransUnion), to verify the information in your credit report with third parties as necessary, and to periodically update your credit information with credit reporting agencies. You are hereby notified that a consumer report containing credit and/or personal information may be referred to in connection with this application. You consent to accept, receive and use in electronic form any and all agreements, notices, disclosures and other documents or information in relation to this application that EcoHome Financial may deliver to you.

How is my personal data used?   Privacy policy

☑ By checking this box, you consent to receive commercial electronic messages from EcoHome Financial at your email address and telephone number(s) provided by you in this application or from time to time in connection with your account, including electronic communications that market or promote our programs, products, services, offers, events and surveys that may be of interest to you. You may withdraw this consent at any time. You may contact EcoHome Financial Inc. at 325 Milner Avenue, Suite 300, Toronto, Ontario M1B 5N1 | www.ecohomefinancial.com. *

The Customer has the ability to view `How is my personal data used?' and 'Privacy Policy'

STEP 12:

Click Submit Application.

Submit Application

STEP 13:

A confirmation page will be displayed upon successful submission.

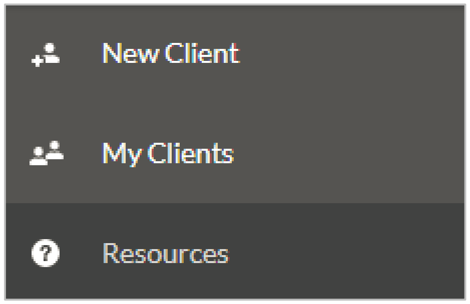
Credit check processed successfully.

Congratulations, User User has been pre-approved for **$20,000**

My Clients

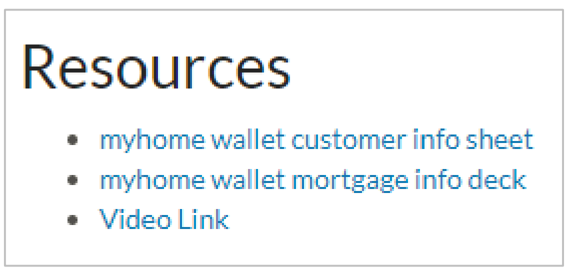
STEP 1:

The Resources section can be selected from the Main Menu



STEP 2:

Resources will allow Mortgage Broker Reps to access update material at any time and will be presented on the screen to view, download or print



Status's And What This Means

Status	What does this mean?
Credit Review	The Clients lead requires further review from a Credit Specialist
Pre-Approved 10K	The Clients lead has been pre-approved by the system
Pre-Approved 15K	The Clients lead has been pre-approved by the system
Pre-Approved 20K	The Clients lead has been pre-approved by the system
Declined	The Clients lead has been automatically declined by the system
Cancelled	The transaction has been cancelled at the request of the Customer or Home Improvement Specialist
Saved	The lead has been accepted by a Home Improvement Specialist; the transaction is in progress with the Home Improvement Specialist
Submitted	The transaction has been completed
Ready for Audit	The transaction has been completed by the Home Improvement Specialist and submitted to Head Office for review
Booked	The transaction has been audited and is ready for funding