Wholesale SF Step by Step Guide

1. Verify Client PII
2. Read Credit Voice Authorization scripting
3. Select "Pull Credit" (repeat process for Co-Applicant, if necessary)
4. Review Debt Accounts table & program estimates
5. Verify any Conditions and Acknowledgements
6. Complete Cash Flow Assessment (CFA)
7. Verify that all File Readiness pillars are green
8. Select "Submit to UW"
9. Wait for UW response
10. Review final program numbers/estimates with client
11. Complete NECA for any non-enrolling joint account holders, if necessary
12. Play the Program Disclosure Recording (conference call)
13. Send "Bank Disclosure Email"
14. Gather banking information
15. Click on "Validate Banking Information"
    a. If you receive an error for bad banking information, client will need to provide different banking info
16. Verify that all Agreement Readiness pillars are green
17. Verify clients Draft Type & First Draft Date is correct
    a. Select "Push Data" if any changes have been made to the file
18. Select "Generate Agreement"
19. Walk client through signing DocuSign agreement
20. Once client has finished signing, refresh SF (there may be a 1-2 min delay!)
21. File status will update to Welcome Call Ready
22. Warm transfer the client to Welcome Call number
    a. Give agent the clients phone number to locate the file