

# Onboarding Timeline Transcript

## Nomination Received

Your BDM or Mortgage Club will nominate you, followed by an initial meeting with one of our National Account Managers.

## Due Diligence Form Issued

We'll issue a 'Getting to Know You' form to help us better understand you and your business.

## Due Diligence Form Returned

We receive your fully completed 'Getting to Know You' form and may contact you with any questions.

## Key Checks Completed

We complete key business checks with the FCA, FoS, ICO, BrokerID and Companies House and raise any queries.

## Terms of Business Issued

We'll issue your 'Terms of Business' for you to review, sign and date to enable us to complete the final parts of the journey.

## Active on Panel and Application System

We'll set you to live on our panel and open your access to our online application system enabling you to submit business.