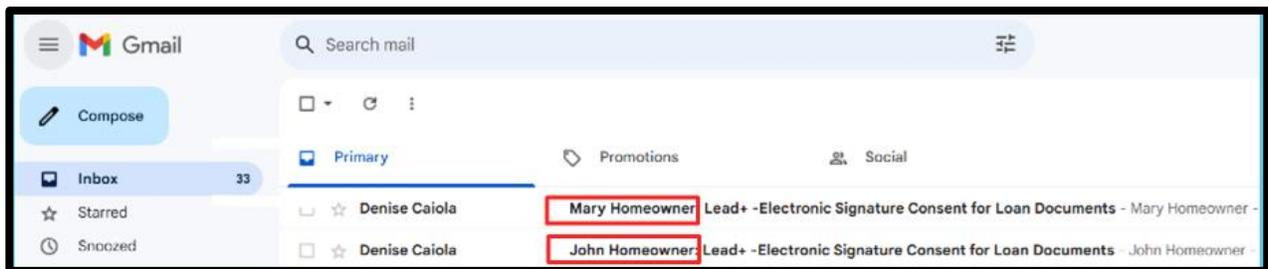# LEAD+
WHOLESALE LENDING

Applicant Portal

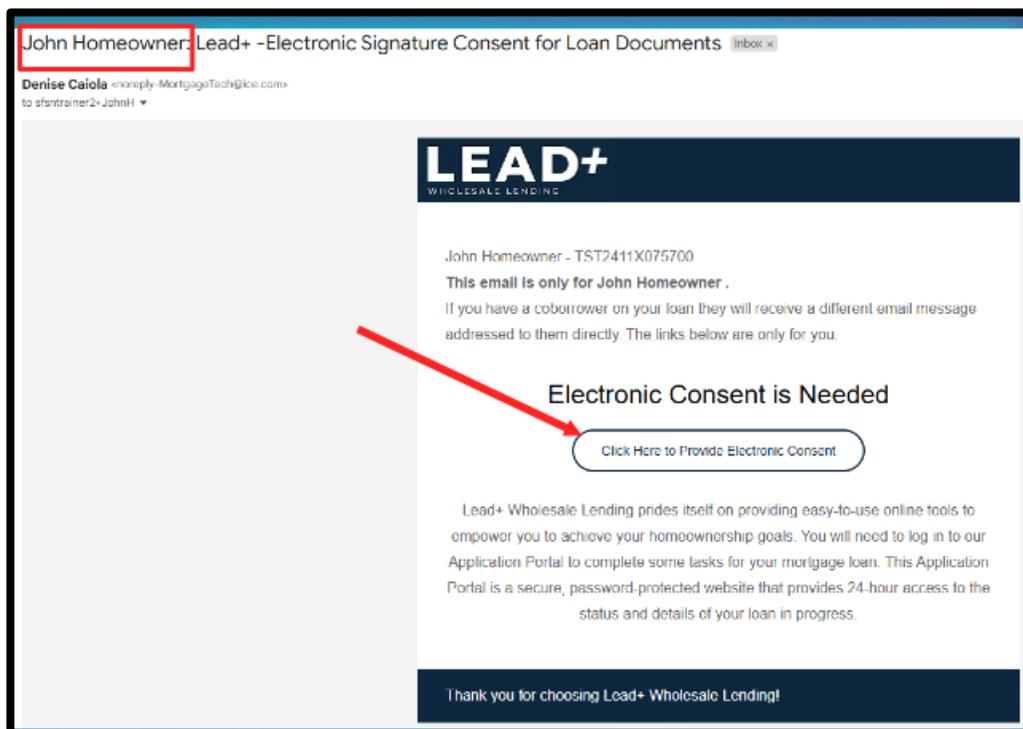## Create Account/Electronic Consent/eSigning Disclosures

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Create Account:

You will receive an email from your Loan Officer

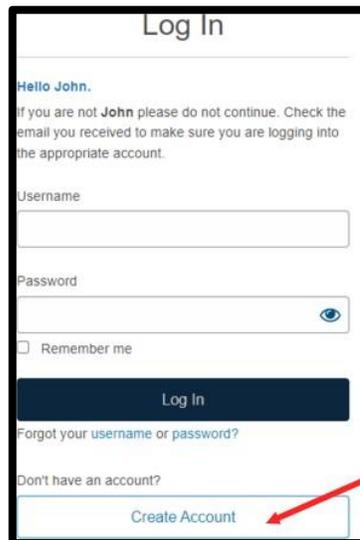*If application has a co-borrower, each applicant will need to open the email addressed to them*

Confirm the email is addressed to you, open and **Click** the box
"*Click Here to Review/Sign Documents*"

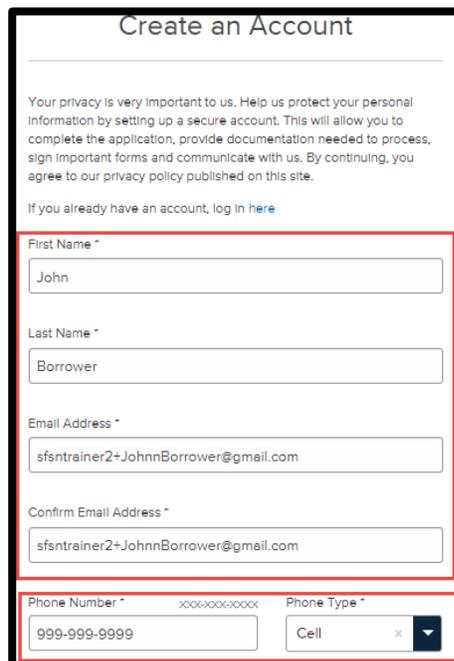From the Log In screen **click** "*Create Account*"

Enter:

Your first and last name

Email address and confirm your email address

Phone number and **select** "*Phone Type*" from dropdown

LEAD+
WHOLESALE LENDING

Create a Username and Password

Check *"I'm not a robot"*

Click *"Create Account"*

Username *

JohnnBorrower

Password Requirements

• *Between 8 and 64 characters*
• *At least one lowercase character*
• *At least one uppercase character*
• *At least one special character*
• *At least one numeric character*

Password *

••••••••••

Password requirements met ⓘ

Confirm Password *

••••••••••

✓ I'm not a robot
reCAPTCHA
Privacy · Terms

Create Account

Cancel

Electronic Consent:

From the Log In Screen;

Enter Username & Password

Check "*Remember Me*" if you prefer

Click "*Log In*"

*If you have forgotten your Username or Password, click on the specific hyperlink to assist in retrieving the credentials

Log In

Hello John.

If you are not **John** please do not continue. Check the email you received to make sure you are logging into the appropriate account.

Username

JohnBorrower

Password

••••••••••

☐ Remember me

Log In

Forgot your username or password?

Don't have an account?

Create Account

To access your account you will need an authentication code.

Select How you would like to receive the authentication code, either "Text" or "Call"

Enter The authentication code

Click "*Submit*"

Access Your Account

In order to access your account, you'll need to enter an authentication code. How would you like it sent?

Contact me at

********4444

Text

Call

Enter Your Code
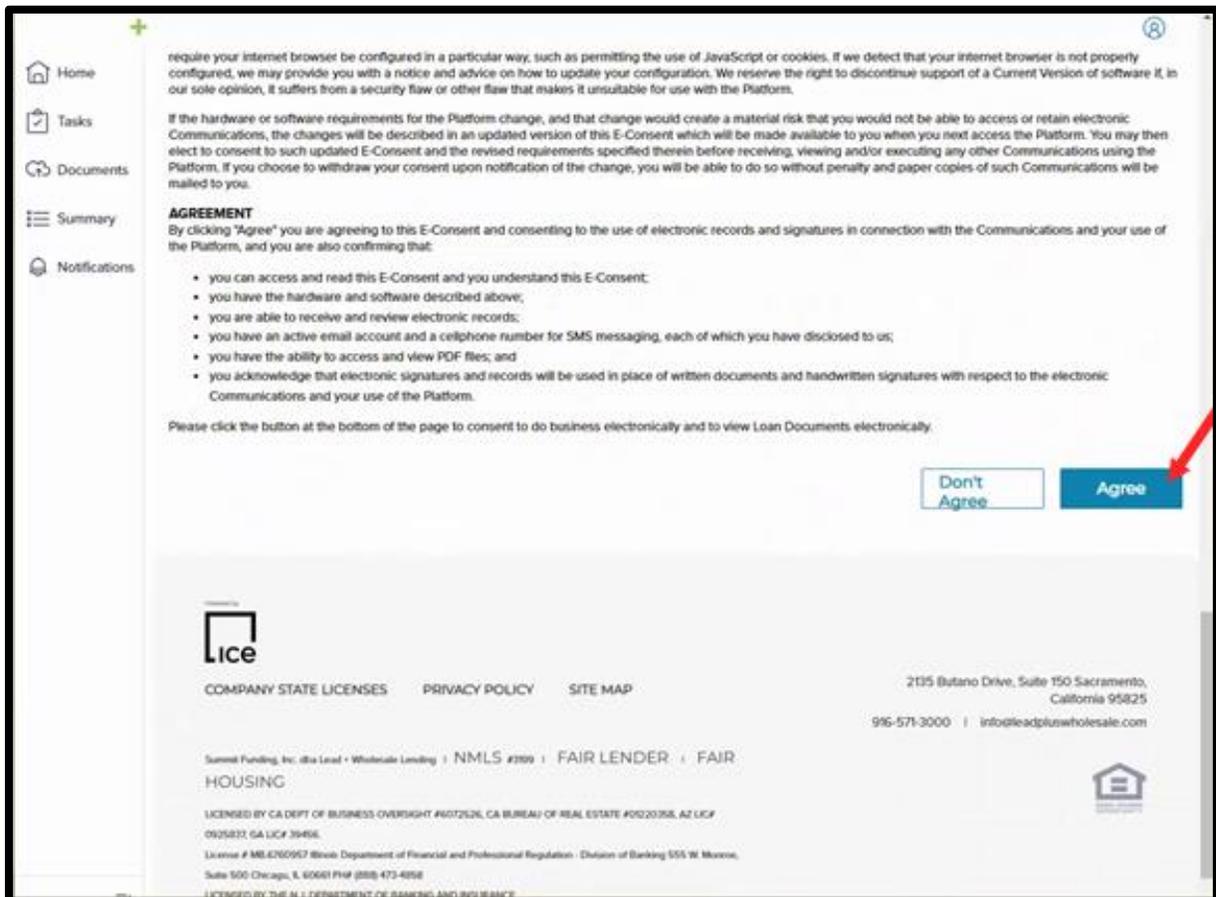
An authentication code was sent to
*******3296

699858   Submit

If you have not received the code, click here to resend code.

Back

To agree to electronic consent, ***read and review*** the Electronic Consent Agreement

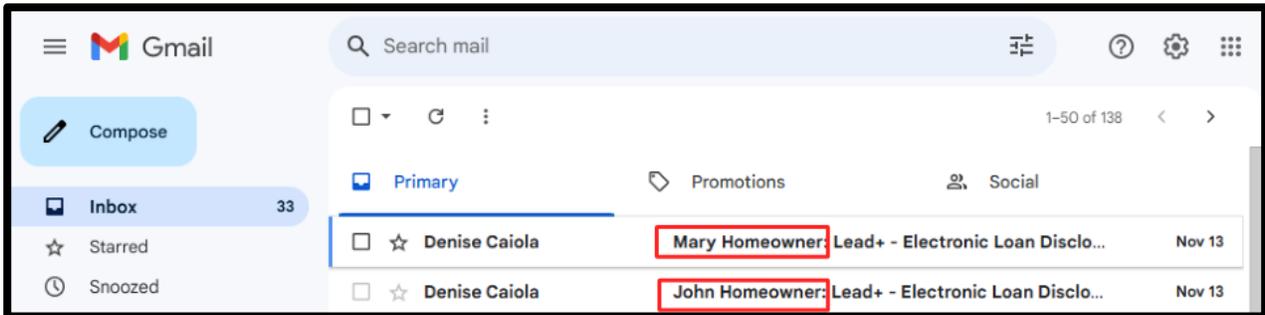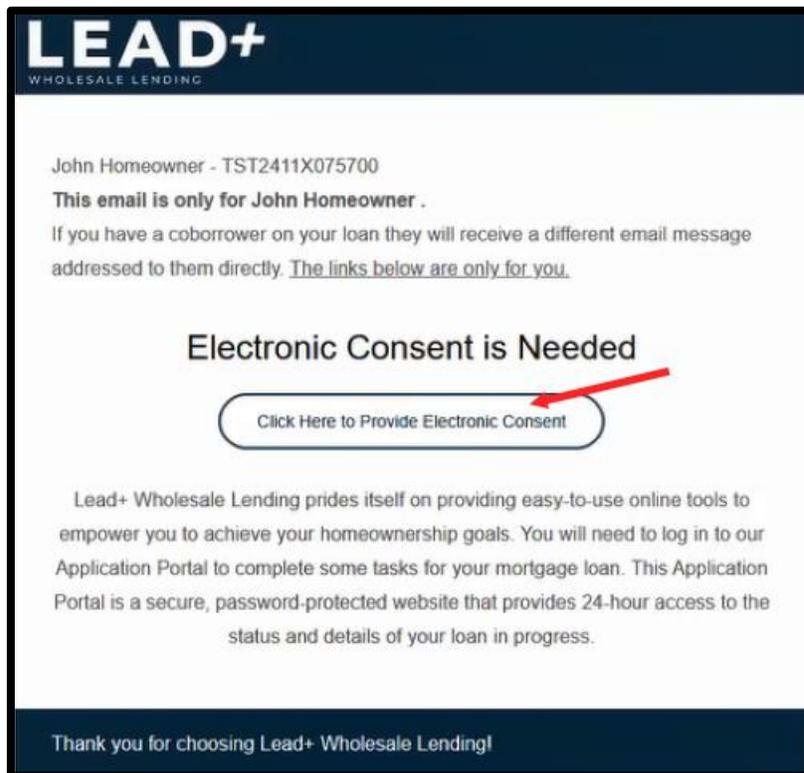***Scroll*** down to bottom and ***select*** "Agree."

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eSigning Disclosures:

The borrower and co-borrower will each receive an email from the Loan Officer (or their team)

Click the "*Click Here to Review/Sign Documents*" button

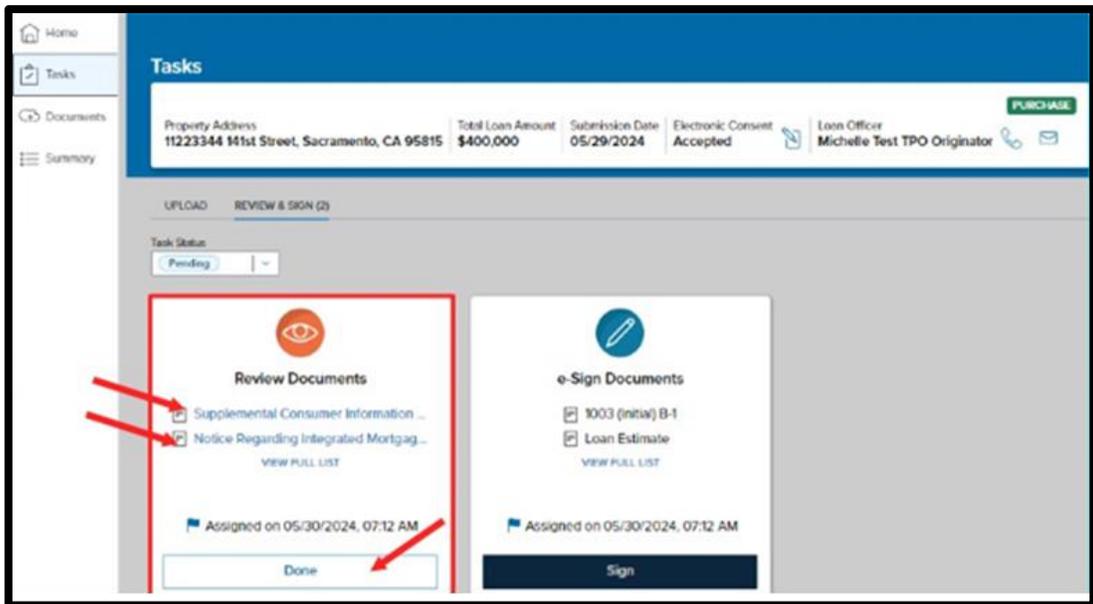**Enter** your login and password

Click "*Log in*"

There will be two tiles present, one "*Review Documents*" and the other "*e-Sign Documents*"
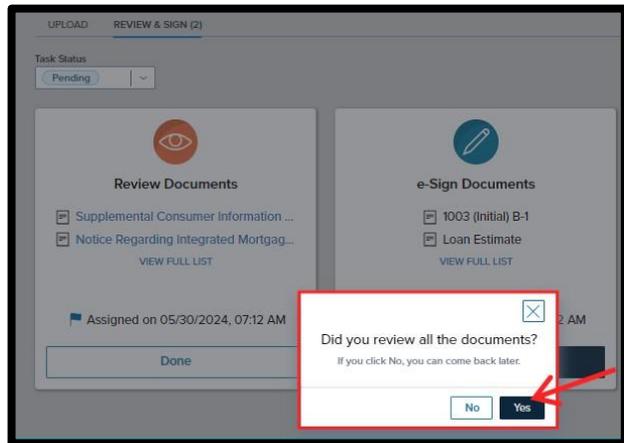
"*Review Documents*"

Click the hyperlink for each document to open and review (do this for all documents.

After all documents have been reviewed, **Click** "*Done*"
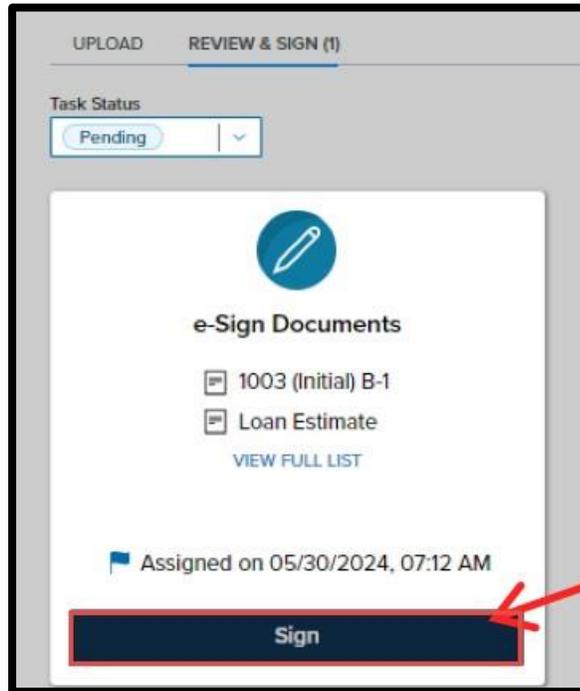

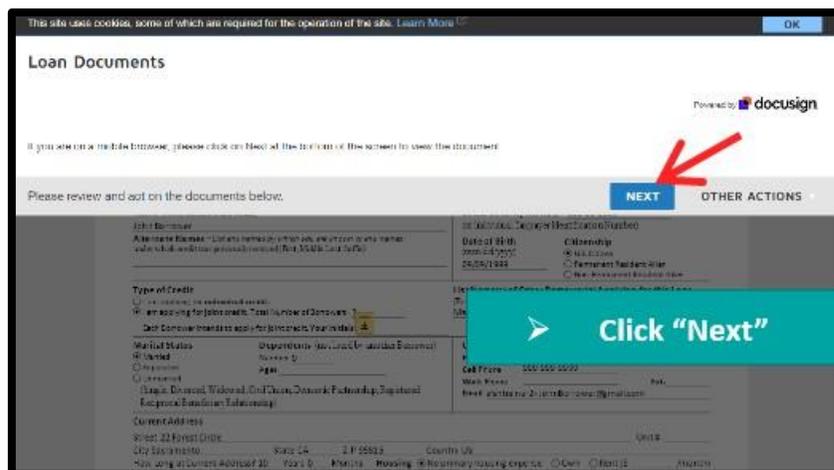A pop up will ask if you have reviewed all the documents, **select** Yes"

"e-Sign Documents"

Click "*Sign*" button to open the disclosure package

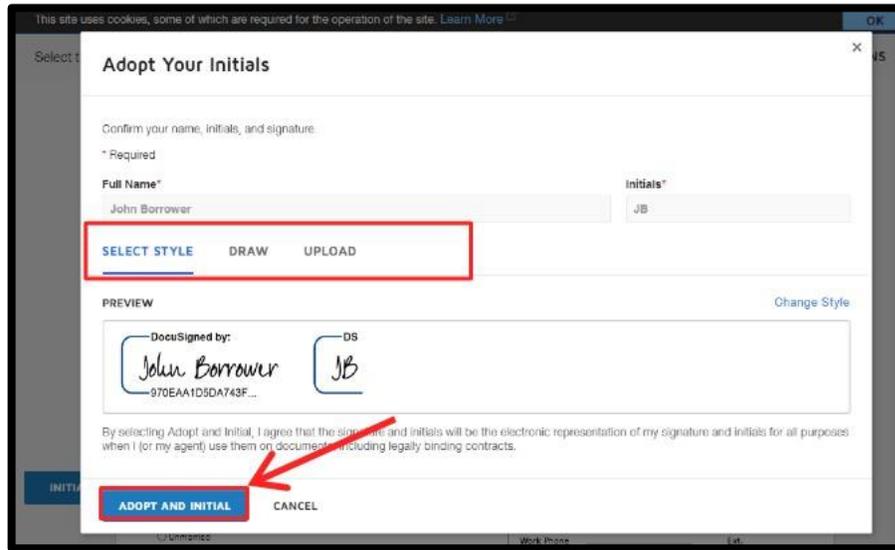**Click** "*Next*"

Click "*Start*"

Click the first yellow box to "*Initial*"

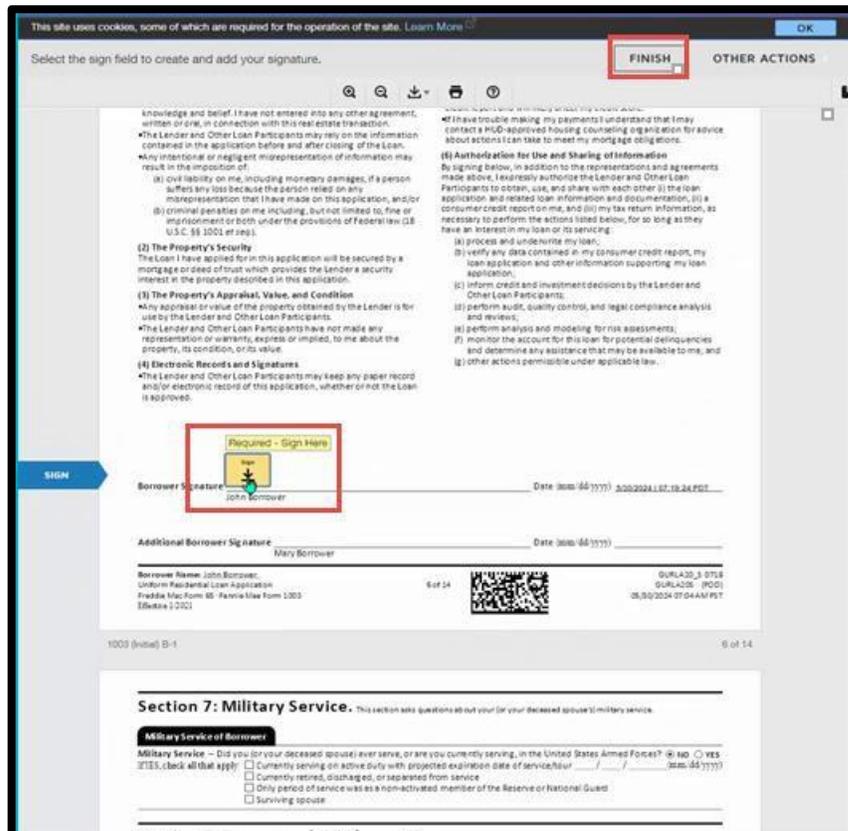**Select/draw** signature and **click** "*Adopt and Initial*"

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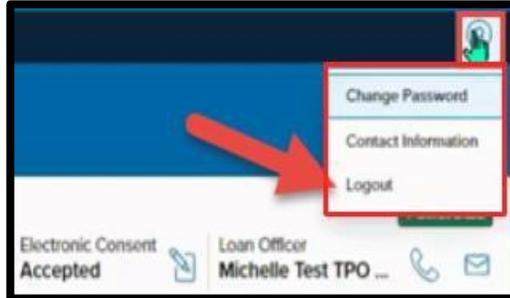*Scroll* through and *sign/initial* by *clicking* on the yellow boxes throughout the disclosure package

*Some documents require additional information/input

When complete, *click* "*Finish*"

Log Out;

Click the silhouette in top right corner and **select** "*Logout*"

11/26/24