

CLIENT APPROVAL GUIDE

OVERVIEW

This guide is designed to help new clients create a profile and navigate the approval process.

- 1. Navigate to the Arc Home LLC website: <u>https://www.archomellc.com/</u>
- 2. Click Become a Partner



- 3. The **Sign In** screen will appear, if an account has previously been created enter email and password
 - a. If registering for the first time click **Register as a new user**, complete the form and click **Register**

	Register
Sign In	Create a new account
	First Name
Use your email address to sign in	Andy
Email	Last Name
name@example.com	America
Password	Email
password	AAmerica@ArcHome.com
Remember me?	Password
Log in	
Forgot your password?	Confirm Password
Register as a new user	
Resend email confirmation	Register



4. A confirmation note will appear, open the automated email and click **clicking here** to authenticate your email address



5. Enter your email and password then click Log in

Sign In
Use your email address to sign in
Email name@example.com
Password
password
C Remember me? Log in

6. Complete all fields marked with a red asterisk * then click Save

Counterparty Application Submission				
Counterparty Information				
ields marked with asterisk (*) an	e mandatory			
Legal Company Name *		NMLS ID *		
Contact Name *		Contact Email		
Contact Phone *		Contact Title *		
Application Type *	Nothing selected -	Account Executive *	Nothing selected	
Status of Request *	New			
How to Use this Page?				
 Please click "Save" to start your application. Click the "Document Checklist" link to access the required documents. Then click "Manage Documents" to upload your application documents. Lastly, click "Submit for Arc Review". 				
		Save		



7. Once saved, at the bottom of the screen a navigation bar will appear, click **Document Checklist** to see the specific items that must be attached to the application



a. Click the individual **Blue Links** to download each template or click **Download Templates** in the bottom right corner to download all at once (checklist will be based on selected application type)

Counterparty Application Document Checklist				
Please download the docum To download and save all av 1. Right-click (control-c 2. Choose "Save Link As 3. Choose the folder loc	nent templates listed below, vailable document template (lick) on the document temp s" cation on your computer to	, then use the 'Manage Documents' link to upload the completed documents. s, click Download Templates or to download and save an individual document template: plate name save the file		
Application Type	IsRequired	TemplateDownloadLink	Instructions	
Broker Only	Y	Broker Application	Must be completed and signed	
Broker Only	Ν	AIR (Appraiser Independence Requirements) Compliance Plan, if applicable	In accordance with FNMA guidelines	
Broker Only	Υ	IRS W9 Form	Current Version	
Broker Only	Υ	Broker Agreement	Must be completed and signed	
Broker Only	Υ	Broker Compensation Selection Form		
Broker Only	Y	Quality Control Plan	If no written plan exists, please summarize any quality control measures that you have in place.	
Broker Only	Υ	Owner Resumes/Bios	Bios acceptable	
Broker Only	Υ	Corporate Resolution	AllI authorized signers for the company	
Broker Only	Υ	Balance Sheet and P&L/income Statement	No more than 6 months aged	
Broker Only	Y	AML Policy	Please provide copy of AML policy or LOX describing how compliance with FINCEN's requirements are managed.	
Broker Only	N	Arc Home TPP Approval Form	Only applicable if using TPP at Arc Home	
Broker Only	Ν	OFR 494-13	Only applicable if using Florida individual TPP at Arc Home	
			Download Templates Close	

8. Once the templates and other required documents are complete, click Manage **Documents** to begin associating the documents to the appropriate document type



9. All document types will be visible, they can be filtered from the **drop-down** menu, to add a document click the **Pencil**, clicking the **Trash Can** will remove attached document(s)

Manage Documents							
Document Type	ALL ~	Filter Back to full List					
					Docume	ent Cou	unt: 12
Document Type					Is Requi		Â
Broker Application					Y	2	ŧ
AIR (Appraiser Independence Requirements) Compliance Plan, if applicable				_	N	•	÷



10. A new window will appear, enter any **comments** for the review team and click **Choose Files** to select required document(s) then click **Update** to attach

Edit Document	×
Document Type	
Broker Application	
Document Submitter Comments	
	_/
Document Review Status	
	~
Document Review Comments	
Document File(s)	
Choose Files No file chosen	
Update Clos	е

11. Once all required documents have been attached, click Submit for Arc Review



Arc Home Counterparty will review the package and reach out directly with your approval. For questions about your application process, please contact your Arc Home Account Executive or email <u>counterpartysubmissions@archome.com</u>.