Financeit

QUICK REFERENCE GUIDE

Creating a New Loan

Log in to Financeit on your personal computer at www.financeit.io or on your Financeit app (available on the App Store and Google Play).

A. On your Financeit dashboard, click **Create Loan.**

B. Choose a purchase type and purchase amount (if applicable), and a promotional program or our free program, and click **Complete With Customer.**

C. Work with your customer to complete the application form and click **Submit Application.**

Financeit returns a credit decision instantly and shows you the maximum amount your customer is approved up to.

(!) A co-borrower can be added to a loan after you submit the initial application.

Did you know?
You can invite your customer to complete an application on their own, privately, by clicking **Send by Email or Text** on the new loan application screen.

Completing the Financeit Checklist

To get funded, complete all of the items in the Financeit Checklist for the application. You can complete the Financeit Checklist items in any order.

- ✓ Confirm the purchase details for the purchase your customer is making.
- ✓ Verify your customer's photo ID **in person.**
- ✓ Submit any required documents, such as a void personal cheque and the invoice.

See document requirements on page 2.

Did you know?
You can invite customers to sign and submit documents on their own by clicking the **Send Invitation** button at the top of any loan step.

Questions? We're here to help!

Phone: 888-536-3025 | Email: service@financeit.io | Fax: 888-754-6570
Monday-Friday 9am to 9pm ET | Saturday 10am to 6pm ET

Financeit

QUICK REFERENCE GUIDE

Submitting documents

Financeit gives you multiple options for submitting documents:

UPLOAD DOCUMENTS

Go to the Financeit Checklist item for the document you want to submit and click **Upload a File.**

EMAIL DOCUMENTS

You can email documents to docs@financeit.io (please include the loan number).

FAX DOCUMENTS

You can fax documents to 1-888-754-6570 (please include the loan number).

Remember, you can invite customers to sign and submit documents on their own by clicking the Send Invitation button at the top of any loan step.

Document requirements*

INVOICE
(IF REQUIRED)

Invoices must include the following:

- ✓ Business name.
- ✓ Customer name.
- ✓ Address of the location where the product is delivered or installed.
- ✓ Itemized description of purchases with corresponding prices and applicable taxes.

  Any loan details included on the invoice (including the amount to be financed) must match the loan agreement.

If the purchase includes a downpayment, proof of downpayment might be required.

PROOF OF INCOME
(IF REQUIRED)

Accepted proof of income types include:

- ✓ Regular taxed employees must submit a pay stub. The pay stub must not be handwritten and must be dated within 30 days of application date.
- ✓ Self-employed applicants can submit a Notice of Assessment.
- ✓ Retired applicants can submit bank statements or pension and retirement statements.

Financeit might contact the applicant's employer to verify or request additional documents.

VOID PERSONAL CHEQUE

The cheque must be in the applicant's name, must not be handwritten and must be associated with a chequing account. We do not accept business cheques.

We also accept pre-authorized debit (PAD) forms. If the PAD form is handwritten it must be stamped by the bank.

* Document requirements are subject to change. For application specific requirements. please refer to the Financeit Checklist.

Questions? We're here to help!

Phone: 888-536-3025 | Email: service@financeit.io | Fax: 888-754-6570
Monday-Friday 9am to 9pm ET | Saturday 10am to 6pm ET