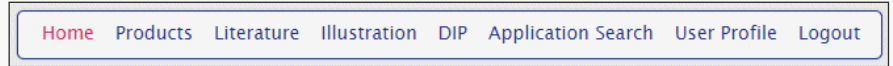


# BROKER PORTAL - HOW TO ADD A CLUB

If you are Directly Authorised once your registration has been accepted on panel, before you submit any business you will need to add a mortgage club to your registration.

1. To do this, once you have logged into the portal, click on "User Profile" from the tool bar:



2. Next, select "Change my submission route list":

The 'User Profile' page has a grey header with the title 'User Profile' in blue. Below it is a section titled 'What do you want to do?' in blue. This section contains four radio button options: 'Change My Password', 'Change My Address Details', 'Change My Contact Details', and 'Change My Submission Route List' (which is selected with a black dot).

3. Next, from the drop down list on the left hand side, click on your preferred mortgage club to highlight it, then click the » box to move the mortgage club to your "Preferred list". To remove a club from your "Preferred list", follow the same steps, but click the « box instead:

The 'Change My Submission Route List' page has a grey header with the title. It is divided into two main sections. The left section, 'Select Mortgage Club:', contains a scrollable list of mortgage clubs, including '2020 Homeloans T/A The Select Partners 3mc (U.K.) Limited {Mortgage Club}', 'Active Investments (Reading) Ltd {Club}', 'All Types of Mortgages Ltd (AToM) Club', 'Bright Star Financial Ltd {Mortgage Club}', 'Brilliant Solutions {Mortgage Club}', and 'Buy to Let Club trading name of The Buy Capital Advances (UK) Limited {Mortgage Club}'. Between the two sections are two buttons: a right-pointing arrow (») and a left-pointing arrow («). The right section, 'Preferred List:', is currently empty. At the bottom, there is a label 'Confirm password to perform change: \*' followed by a password input field.

4. You will be able to add more than one club if you need to.
5. Finally, you will need to enter your password into the bottom box and click "OK" to save the changes.
6. Once the password has been confirmed, please click on "Home" to start submitting a new case.

**You will now be able to submit a new case.**

**We can provide literature in large print, Braille and audio tape. Please ask us for this leaflet in an alternative format if you need it.**

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# PRECISE.

Intermediaries only.

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