

# INVOICE FACTORING

## Get Started Checklist

### Confirm that Invoice Factoring is a good fit for your business:

- |   |  |
|---|--|
| <input type="checkbox"/> Your customers are other businesses. | <input type="checkbox"/> Clients pay by check or ACH/Wire. |
| <input type="checkbox"/> You bill customers on terms.         | <input type="checkbox"/> Customers pay within 90 days.     |

*If you checked all the above boxes, you are ready to proceed!*

### Follow these steps to get started

#### Apply

- Submit Application:** Complete and send the application form.
- Provide an A/R aging report**
  - Discuss your needs with one of our team members to ensure we provide you with the correct solution. Depending on your industry, we may request additional information.
- Receive LOI:** The Letter of Intent (LOI) with your basic financing structure.
- Return the signed LOI** and other business information as requested.

#### Final Approval

Our team will do a review of the account details, provide a final approval, and send you closing documents to get you ready for funding.

- Sign and return the final agreement**, typically via DocuSign.

#### Get Funded

- Submit your invoices**, we'll verify them, and your accelerated cash flow begins.

#### Work with your Account Manager

You will have a dedicated account manager who will get to know you and your business to ensure you receive the service your business needs and deserves. That person is your go-to source for all servicing needs.

