

# Investment and RSP Loans

## Dealer Review

At B2B Bank, we're committed to making it easier for agents and Managing General Agencies (MGAs) to do business with us. That's why we provide MGA head offices with two easy-to-use online review options to suit their needs.

### Option A: Dealer review access

This option allows MGAs to control and monitor all loan applications submitted by their agents.

- The MGA is provided access to EASE, our online application tool, to review applications.
- The MGA reviews and approves or declines each loan application.
- After the MGA approves the application, B2B Bank will begin the initial adjudication process.

**TIP:** To provide agents and their clients with the best possible service and to avoid cancellations, applications should be reviewed by the MGA in a timely manner. After 90 days, applications pending approval from the MGA will be cancelled.

### Option B: Dealer view only access

This option provides MGAs with view only access of all applications submitted.

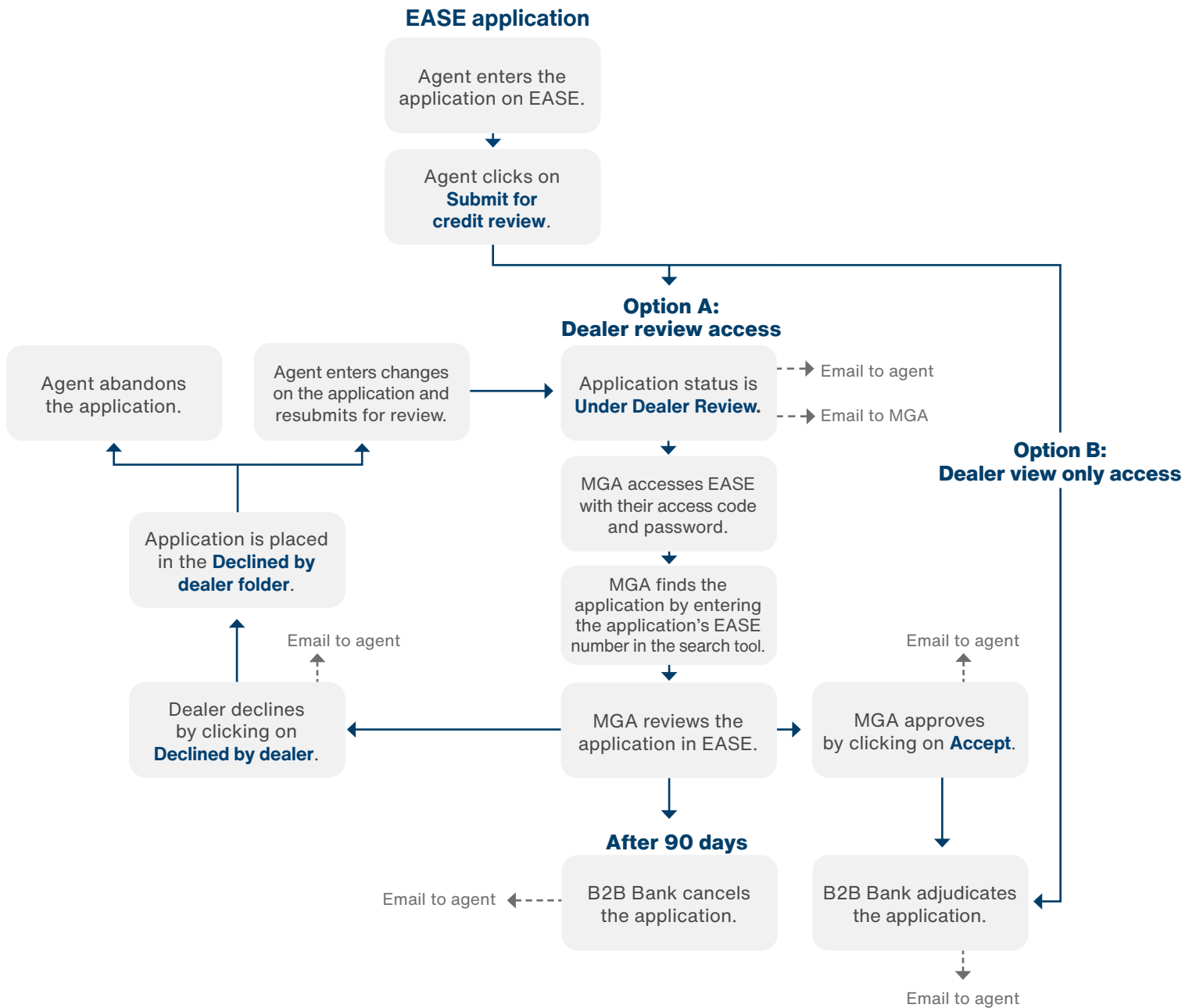
- The MGA is given access to EASE to view all applications submitted by their advisors.
- The MGA is not provided with the interactive capability of approving or declining applications online.
- B2B Bank will adjudicate all loan applications as soon as they are submitted by advisors, without waiting for approval from the MGA.

### EASE reports

Through both options, MGAs benefit from a variety of reports available on EASE, allowing them to analyze sales and historical trends. MGAs can easily customize these reports by selecting the desired criteria from a range of options. The reports will display useful information, such as details of a loan application or the total amount of loans processed/funded during the selected time period.



## Dealer review workflow



## Getting started

Only a few simple steps are required to sign up for our online dealer review:

1. The MGA must review, sign and submit the dealer review *EASE Acknowledgement and Agreement* and the *EASE User Request* form.
2. B2B Bank will then organize an information session and provide the EASE user ID and password.
3. The MGA is now ready to log in to EASE to review all loan applications.

**Contact an Operations Relationship Representative or a Client Services Representative at 1-800-263-8349 to get started today!**

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