



UCS ISO Referral Partner Signup Process Guide

A screen recording of the entire signup process can be found here:

WATCH PROCESS

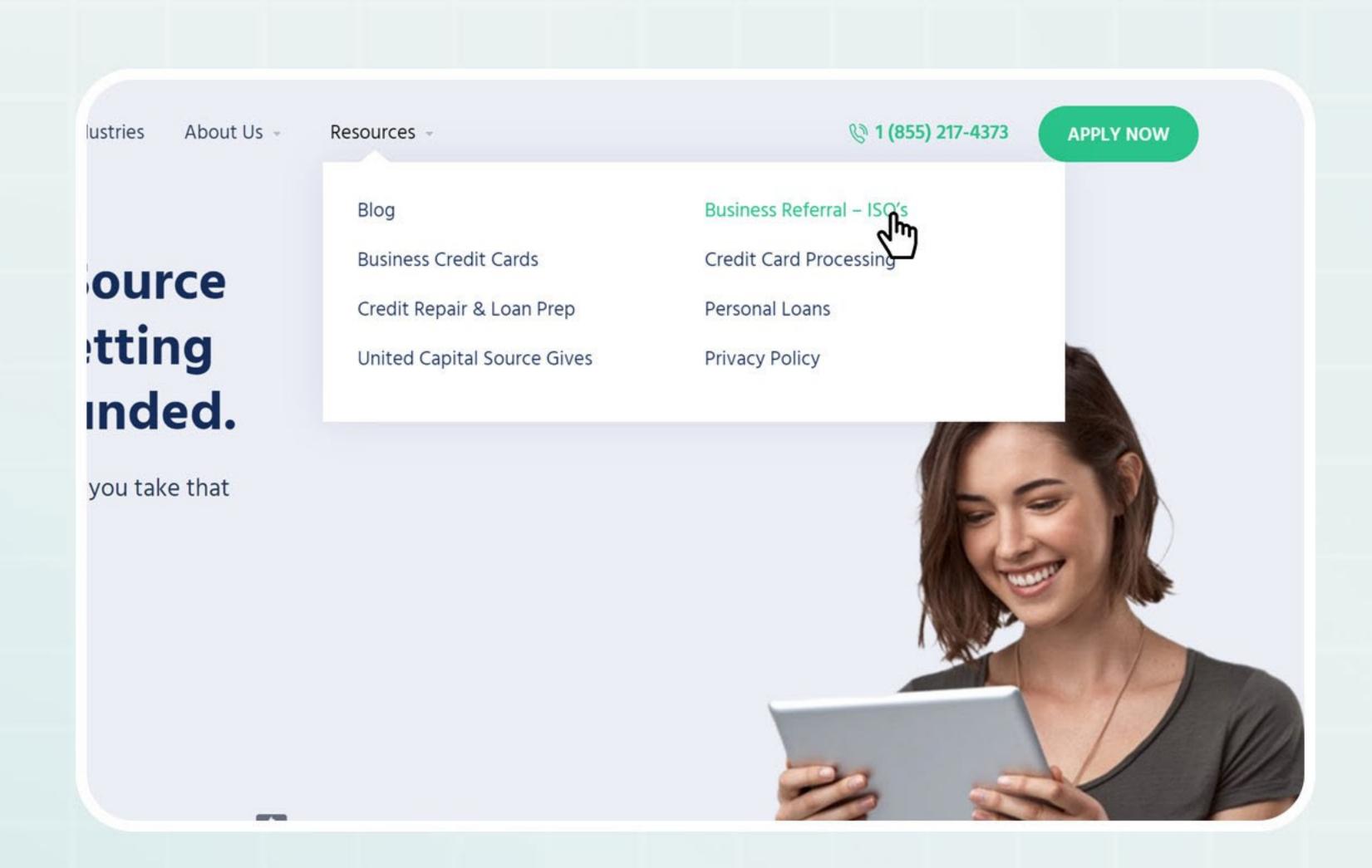
https://www.loom.com/share/e51e091f30a14d08a68d7c7044888f11





Visit our referral partner page and fill out the form at:

https://www.unitedcapitalsource.com/iso

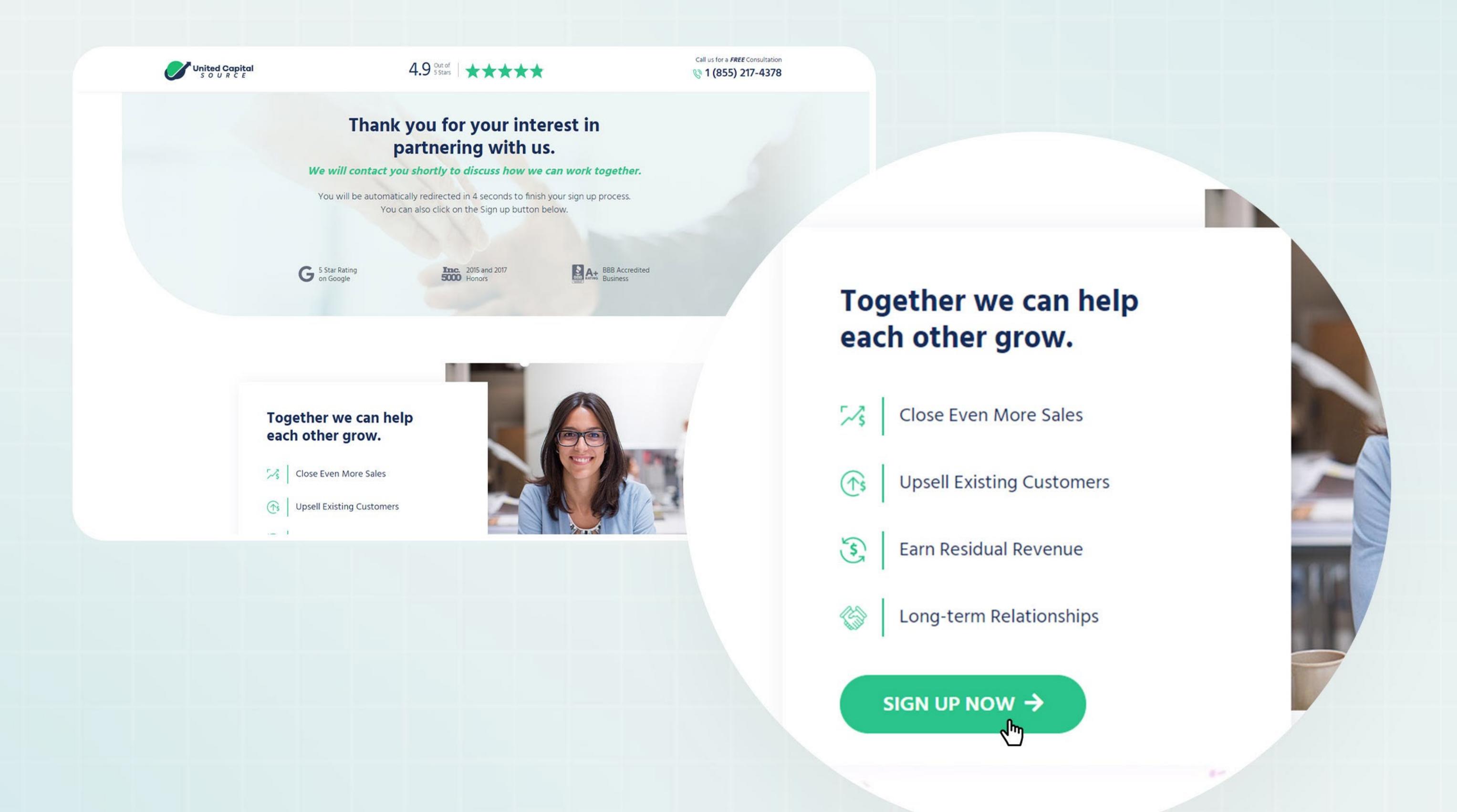


We Excel at One Thing -	Let's Work To	Grow. Together.	
Securing Funds for Small Businesses.	First Name	Last Name	Last Name
Learn more about how our business loan affiliate	Email Address		
program works for you.	Phone		Address
	Company Name		
G 5 Star Rating 5000 Honors BBB Accredited Business	Website URL		
			Phone
	DATA PRIVACY PROTECTED	LEARN MORE →	
			Company Name
<u>~</u> \$	\$		
Close Even More Upsell Existing Sales Customers Give prospects the financial leg Introduce customers to financial	Earn Residual Revenue Earn commissions from our	Long Term Relationships Establish and strengthen long	Website URL
up they need to say "yes" to services they can use to grow your products or services their business	program by providing your clients with funding	term customer relationships	





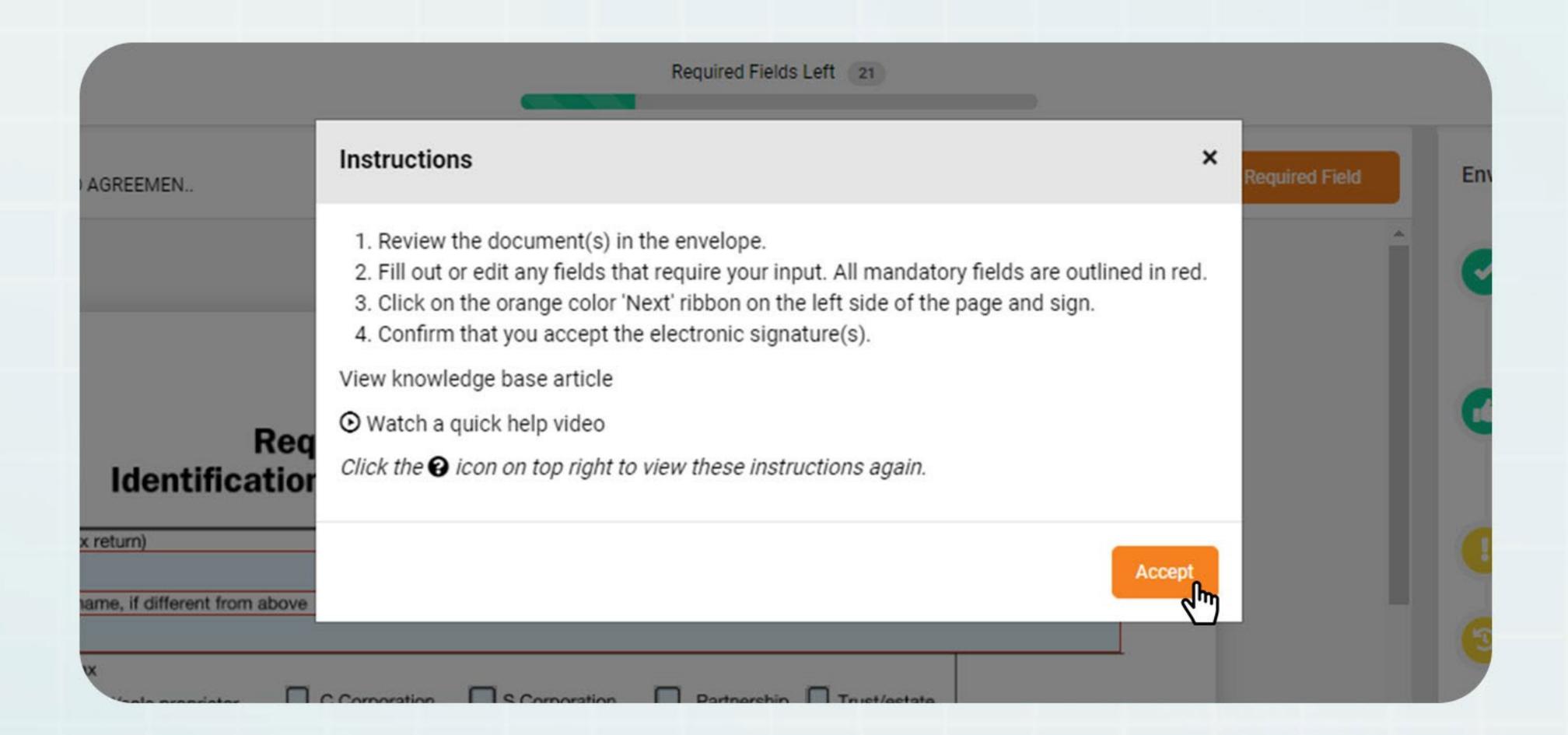
You'll then be redirected to the thank you page; scroll down and click the "SIGN UP NOW" button.



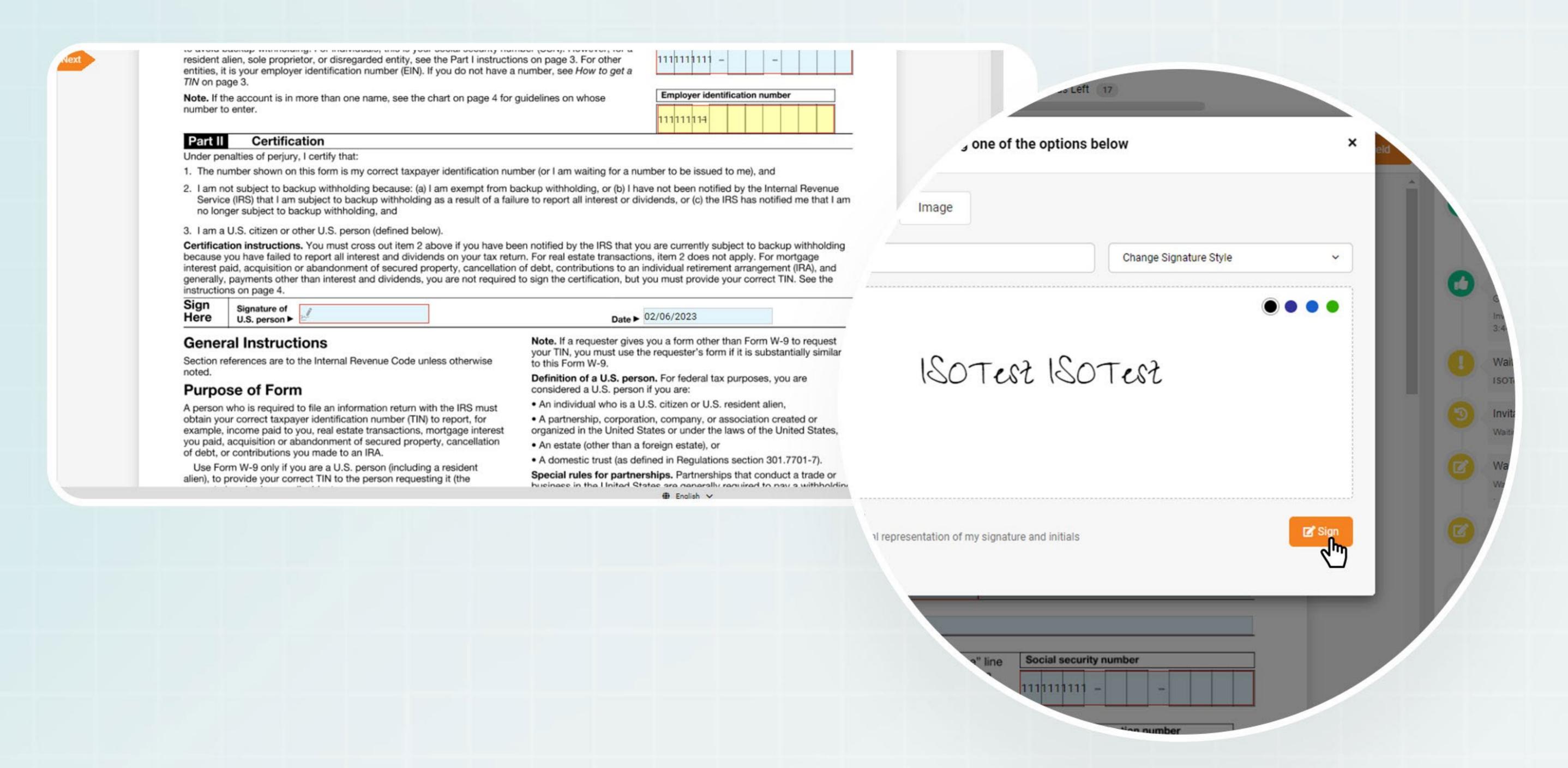




You'll then be redirected to the W-9 Form. Click the "**Accept**" button on the Instructions Pop-up, choose your entity type, and fill out all the required fields of the W-9.



When all required fields are completed, click the "Signature of U.S. Person" field and click the "Sign" button on the Pop-up.







You will then be redirected to the ACH Authorization Form, where you can fill out your banking information and upload a copy of a voided check.

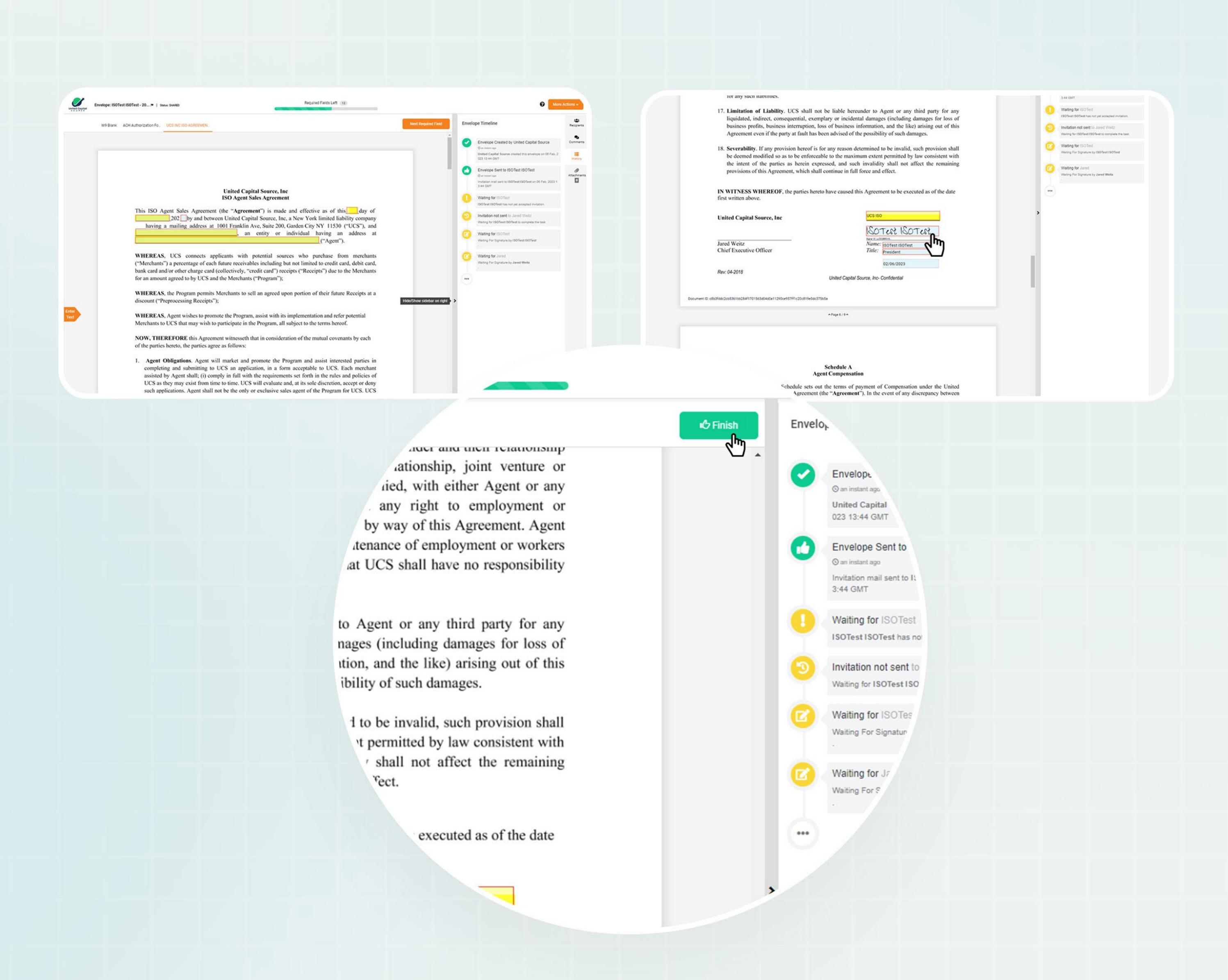
Once completed, go to the top right of the form and click the "Next Required Field" button.

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	Bank Contact Name.				
	Bank Contact Phone #:				
	Account#				
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Next, you will be redirected to the ISO Agent Sales Agreement. Fill out all required fields and click to sign. Once the form is complete, go to the top right of the form and click the "Next Required Field" button, which will then turn into a green "Finish" button. Click the "Finish" button.







Congratulations, you're done signing up! You'll receive an email with a link to our ISO Submission Portal, where you'll be given your ISO # and Portal Submission information to submit your files!

Please note that for any submission, we'll ask you for your signed merchant application, 3 months' business bank statements and the portal application with all required fields completed.

