



# Application process

## Step 1

Gather documents:

- ID/Passport
- Certified proof of address (no more than 3 months old, and must be under the client's name)
- Bank statement of the account from which the client is transferring the funds
- Linklease application

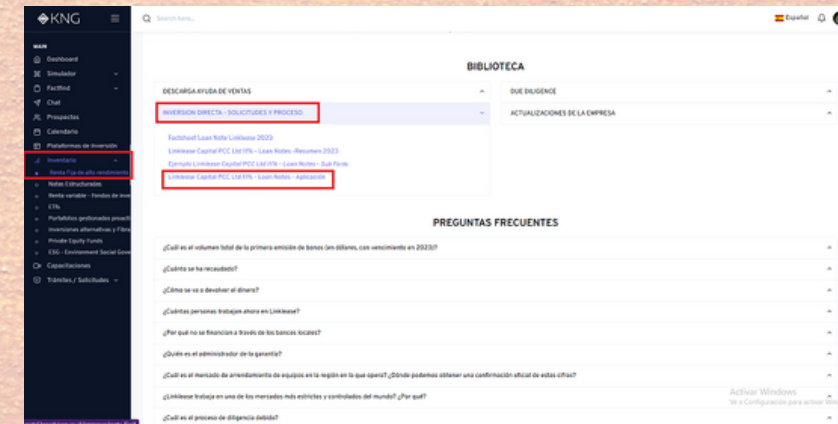
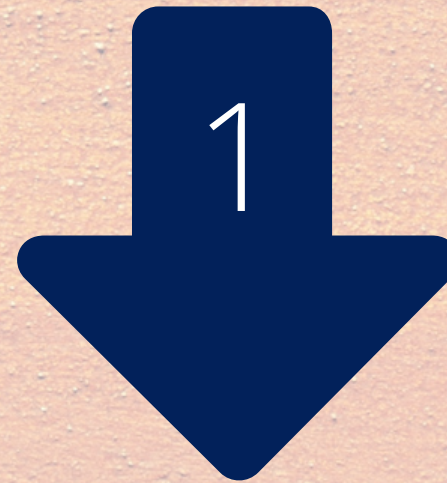
## Step 2

Submit the application along with supporting documents. Remember that the documents can be original copies, scanned copies, or DocuSign copies. Upload the completed documents to the KNG portal.

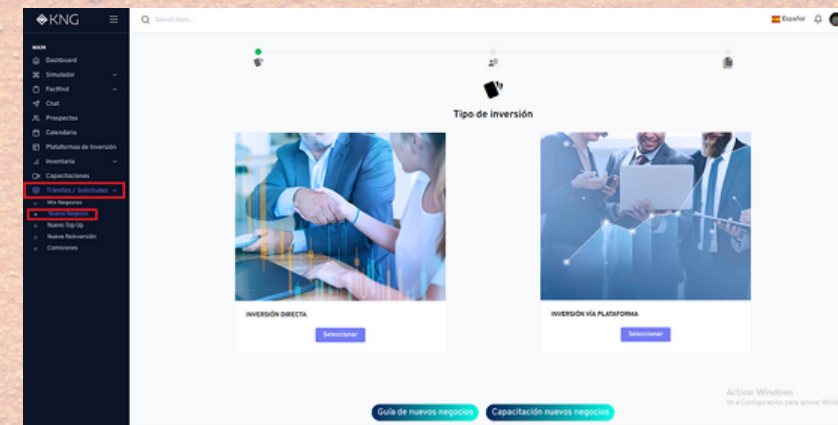
Note: Remember that KNG can make it easy for you to obtain customer signatures via DocuSign.

## Step 3

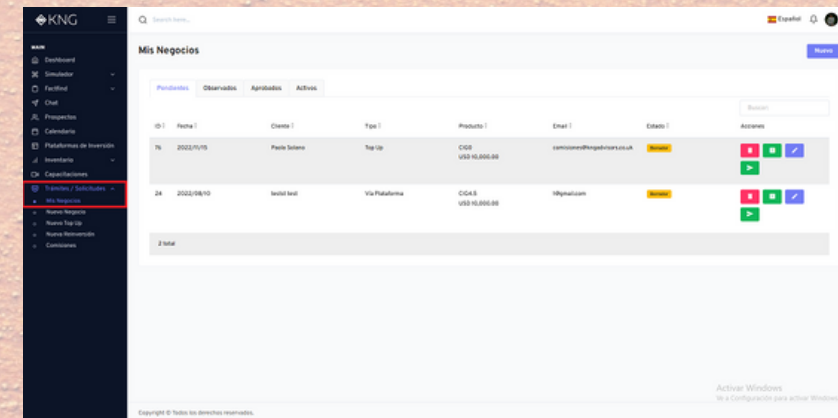
KNG's administrative team will review the application, if changes need to be made, your business will appear under the Pending tab. If everything is in order, the status of the application will be changed to Approved, and KNG will take care of sending the documents to be signed.



The application form can be found in the inventory of the KNG portal, in the Linklease section.



To upload your client's documents, on the left side menu select the option Procedures/Applications, then New Business.



On the My Business tab of the KNG portal, you can monitor the status of the application.

# linklease **Step 4**

After the client has signed the application, all documents are sent to Linklease for review.

The security trustee conducts an AML (anti-money laundering) check.



Note: The review process takes 2 to 5 business days.

## **Step 5**

The company accepts, conditionally accepts, or rejects the request (or may request more KYC data).



Should Linklease request additional KYC data, you will be notified immediately. KNG will also assist you during the process to send any additional requirements that may be requested.

## **Step 6**

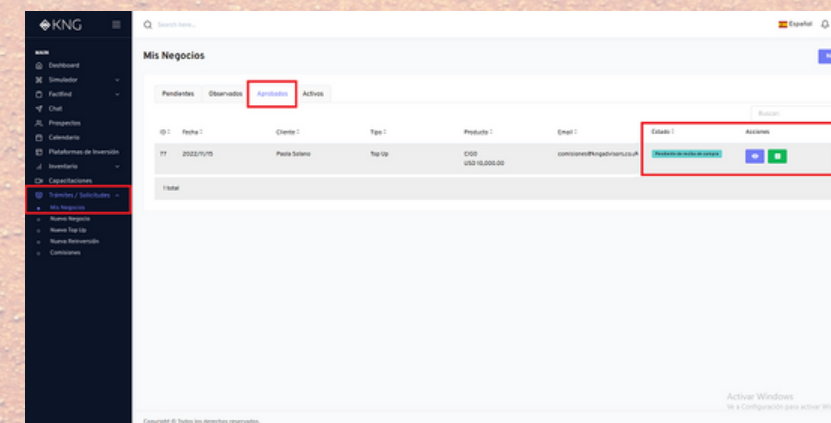
After the company accepts the customer, an email is sent with the bank details for the customer to transfer the funds.



The e-mail will contain the bank details for the customer to transfer the funds.

## **Step 7**

Provide the customer with the SWIFT receipt. Advisor uploads SWIFT receipt to KNG portal, KNG sends it to Linklease.



The SWIFT receipt is uploaded in the customer data tab, on the right side you will see a column that says Actions, and when you click on the blue check mark a window will pop up asking for Upload payment receipt

## Step 8

The investment team will confirm receipt of the funds by email and prepare the welcome package, which contains the welcome letter and the investment contract, which must be signed by the client.



KNG will send you a confirmation email when Linklease receives the customer's funds.

## Step 9

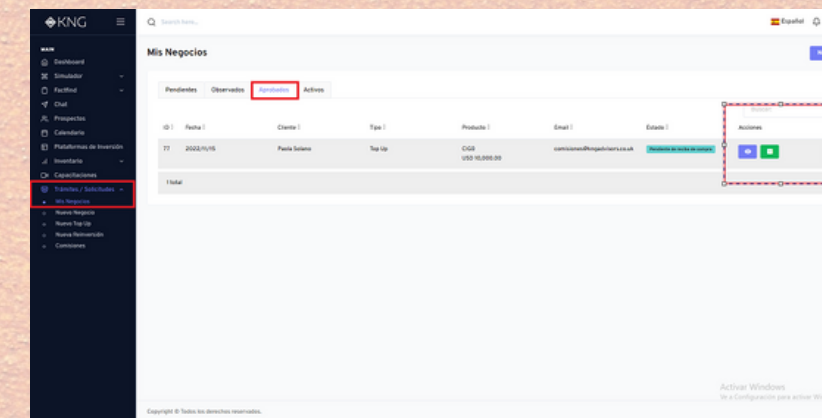
The customer must sign the contract included in the welcome package, once signed, it is uploaded to the KNG portal. KNG will send the signed contract to Linklease, so that they can keep it in the client's records.



The contract can be signed by hand, or KNG can send it to the customer via DocuSign.

## Step 10

Upload signed contract to KNG portal to generate the commissions



On the KNG portal, under the client tab, upload a copy of the contract in order to generate your commissions for this business.

## Continuous attention

Our administrative team constantly monitors investments to ensure that all paperwork is in order and that coupon payments are being made on time.

1 to 2 months before the investment expires, we will give notice for the client to decide if they want their investment returned along with their last coupon payment, or if they wish to reinvest.

## Additional support

KNG can support you by sending the documents by DocuSign to obtain the client's signatures electronically.

Our administrative team is available for any questions, you can contact us at the following email: [admin@kngadvisors.co.uk](mailto:admin@kngadvisors.co.uk)