Membership Application & Agreement Instructions

Fill in the Membership Application Only: Once you fill in all of the fields of the Membership Application, you don't have to fill in any other fields. It auto populates everything needed. It is highly recommended NOT to send this blank form to someone by email to have them fill it in and print and sign. You'll probably never get the sale by giving them the job of filling out the application. If you are meeting face to face, just fill in the form by hand and have the client sign the application, service agreement, and dispute template.

If you are taking the order over the phone, just take their info and input into the form. You can leave the social security number and credit card number fields blank and save the document, and then email it to them to sign and return via fax, mail, or email back to you. Keep their social and card information available to fill in later.

Select a Membership Type: Check the box for either the Primary Membership (for the first person enrolled) or the Add-on Membership (for the second person – spouse/significant other). By default, the Primary Membership Plan is already selected.

Fee Amounts: The fee amounts indicated for each plan type are default values. **This amount is not reflective of you breaking up the Initial Fee.** For example, if you have the member pay $150 now and $149 in two weeks, the Initial Fee would still be listed as $299. Indicate the Initial "Payment" of $150 in the box called "Planned Payment Schedule" on the lower portion of the application. Whatever you select for a membership plan in the upper right corner of the application, it will populate the appropriate initial fee for that plan onto the Service Agreement. When you click the Reset button, the Primary Plan will be selected by default.

Fill in the Primary Member's Name: When filling out the Add-On Membership, indicate who the Primary Member is so we know who the member is attached to.

Fill in the Shared Information Section: Input the name of the referring loan officer (or other referral partner) if the customer wishes to keep them informed. If there is a second person, input that name too. You'll notice that this populates onto the service agreement (2nd page)…along with your name in the agent field. If this is the first time that the company is going to keep this referral partner informed (not presently in our system) then we will need you to provide their contact information in the fields provided on the application. We can keep 2 referral partners informed of the customer's status.

Fill in the Planned Payment Schedule: Indicate when the client wishes to be drafted for the initial fees and monthly fees. You can break the initial fee into two payments. Monthly fees begin 60 days after the initial draft is made. Whether the client breaks the initial fee up or not, it does not change how or when we begin working on their restoration. Generally, we recommend setting the client up for 6 monthly payments. We also recommend that you don't try to guess how long they will need service. Leave that to the home office to determine. We'll stop and notify them if we feel they have reached their goal. Remember that they can stop their service anytime without further monthly payments due.

Reset Form Button: You can clear the form by clicking on the "Reset Form" button at the top of the application. This will clear all the data, except for the Agent Name and Phone #. It also restores the default values for the Initial Fee amounts.

Please don't email applications with the client's secure information on it.