

## No More Forms—Catholic Financial Life Broker Contracting

### Initial Login Screen/First Time User

- Complete the requested information shown below
- Complete security question
- Click “Logon to nomoreforms”



### Login to **nomoreforms**

Company:	<input type="text" value="Catholic Financial Life"/>
Your First Name:	<input type="text"/>
Your Last Name:	<input type="text"/>
Your SSN:	<input type="text"/>
Assign Yourself a Password:	<input type="text"/>
Confirm Your Password:	<input type="text"/>
Client Package Code:	<input type="text" value="Broker"/> <small>(case sensitive)</small>
<input type="button" value="Logon To nomoreforms"/>	

## Returning Applicants

- Login with your SSN and initially created password
- If you do not remember your password, click “Forgot or Change your Password?”
- Follow the reset instructions and log back in

### Returning Applicant

If you have previously entered the **nomoreforms** system, please logon now.

Company:	<input type="text" value="Catholic Financial Life"/>
Your SSN:	<input type="text"/>
Your Password:	<input type="password" value="*****"/> <a href="#">Forgot or Change your Password?</a>
Client Package Code:	<input type="text" value="Broker"/> <small>(case sensitive)</small>

[Logon To nomoreforms](#)

For comments or questions please [email us](#) or contact our Help Desk at

800-686-8279 (8:00 am - 8:00 pm EST)

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## Completing the Required Forms

- Complete all forms that show an “Incomplete” in the Status Section. Those that list optional are just that and you have the option to complete them.

Catholic Financial Life

- Joseph, to complete the form(s) required in the Catholic Financial Broker Package simply click the name of any form with an **Incomplete** status.
- You can view, edit or print any form - by clicking its name.
- You have attached 1 of the 1 required attachments for Catholic Financial Life. [Please click here to add \(or view\) attachments as necessary.](#)

Catholic Financial Broker Package Forms		Status	Submitted
<a href="#">Application for Broker Appt</a>	<a href="#">printable</a>	Incomplete	No
<a href="#">Automatic Deposits</a>	<a href="#">printable</a>	Incomplete	No
<a href="#">Broker Affiliation Form</a>	<a href="#">printable</a>	Incomplete	No
<a href="#">W-9</a>	<a href="#">printable</a>	Incomplete	No

## Completing the Required Forms continued...

- After completing the required information (any box marked in **RED**), you will be presented with two options
  - “Save Draft” this does not complete or submit the form. It only saves the form for future completion
  - “Agree” this completes the form and readies it for submission
    - If the form is completed in its entirety, always hit “Agree”**

Broker Signature:  Date:

### Home Office Use (Home Office completes)

I hereby certify that I have read and reviewed all information submitted by the Applicant Broker and, to the best of my knowledge, I recommend appointment with Catholic Financial Life.

Home Office Signature:  Date:

Save Draft

Agree

Note: Your appointment will be effective only upon written notification by Catholic Financial Life. Brokers must be appointed with Catholic Financial

## Form Status

- Once the form has been completed and you've clicked "Agree," you will see that the status changes from "Incomplete" to "Complete"
- You have attached 1 of the 1 required attachments for Catholic Financial Life. [Please click here to add \(or view\) attachments as necessary.](#)

Catholic Financial Broker Package Forms		Status	Submitted
<a href="#">Application for Broker Appt</a>	<a href="#">printable</a>	Incomplete	No
<a href="#">Automatic Deposits</a>	<a href="#">printable</a>	Complete	No
<a href="#">Broker Affiliation Form</a>	<a href="#">printable</a>	Complete	No
<a href="#">Void</a>	<a href="#">printable</a>	Complete	No

## Uploading Attachments

- To upload copies of your Voided Check, License, and E&O—Click on "Please click here to add (or view) attachments as necessary"
- You have attached 1 of the 1 required attachments for Catholic Financial Life. [Please click here to add \(or view\) attachments as necessary.](#)

Catholic Financial Broker Package Forms		Status	Submitted
<a href="#">Application for Broker Appt</a>	<a href="#">printable</a>	Incomplete	No
<a href="#">Automatic Deposits</a>	<a href="#">printable</a>	Complete	No
<a href="#">Broker Affiliation Form</a>	<a href="#">printable</a>	Complete	No
<a href="#">Void</a>	<a href="#">printable</a>	Complete	No

## Uploading Attachments continued...

- Click on “Choose File”
- Name the file in the box labeled “Provide a descriptive name”
- After you’ve selected the file you would like to upload from your computer, click “Add Attachment”

- *Joseph*, to send attachments to *Catholic Financial Life*, just browse to the file then click the Add Attachment button. You can attach a like. The file size limitation is 10MB.
- Please give each attachment a descriptive name. Click the Done button when finished.
- Click the Done button when finished.
- If you would like to remove an existing attachment, check the Remove box and click the Remove button.

The screenshot shows the attachment upload interface. A green oval highlights the "Choose File" button and the "No file chosen" text. A green box highlights the "Provide a descriptive name:" text and the input field. A green arrow points to the "Add Attachment" button. Below the form, red text reads "Your attachments will be automatically scanned for viruses. No files have been attached." Below that are two blue buttons: "Add Attachment" and "Return to Forms".

For comments or questions please [email us](#) or contact our Help Desk at 800-686-8279 (8:00 am - 8:00 pm EST).

To view our Technical Support Center, please click [here](#).

## Uploading Attachments continued...

- After adding the attachment, click “Done”

The screenshot shows the attachment upload interface after a file has been added. The "Choose File" button and "No file chosen" text are still present. The "Provide a descriptive name:" text and input field are also present. Below the form is a blue button labeled "Add Attachment". Below that is red text: "Your attachments will be automatically scanned for viruses." Below that is a table with the following content:

Attached File	Descriptive Title	Remove
<a href="#">DocuSign Signature Option.pdf **</a>	E&O	<input type="checkbox"/>

Below the table is a legend: "\*\*" Denotes Pending Attachment. Awaiting Form Submission. Below the legend are three blue buttons: "Remove", "Done", and "Return to Forms". A green arrow points to the "Done" button.

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## Submitting the Paperwork

- After all “Incomplete” items read “Complete” in the status bar and you’ve uploaded the required forms, click “Submit Forms” that now appears in the lower right corner.
  - Remember that once you’ve filled in each form, you must click “Agree” on the bottom of the form to make them “Complete”
- Your paperwork has now been submitted and we will begin processing

Catholic Financial Life

- Joseph, you've completed all the Required form(s) in the Catholic Financial Broker Package.
- You've almost done...to electronically submit the form(s), click the 'Submit Forms' button at the bottom of the page, retype your password and click 'Submit' again.
- You can view, edit or print any form - by clicking its name.
- You have attached 1 of the 1 required attachments for Catholic Financial Life. Please click here to add (or view) attachments as necessary.

Catholic Financial Broker Package Forms		Status	Submitted
Application for Broker Appt	printable	Complete	No
Automatic Deposits	printable	Complete	No
Broker Affiliation Form	printable	Complete	No
W-9	printable	Complete	No
Disclosure	printable	Complete	No
Additional Disclosures	printable	Complete	No
Summary of Rights - FCRA	printable	Complete	No
Additional State Notices	printable	Complete	No
New York Article 23-A	printable	Optional	No
Philadelphia Fair Chance Act	printable	Optional	No
San Francisco Fair Chance	printable	Optional	No
Los Angeles Fair Chance	printable	Optional	No
Acknowledgment and Auth	printable	Complete	No
Background Information	printable	Complete	No
Broker Ind.Contractor Agmt	printable	Complete	No

[Return to mmf Logon](#) [Submit Forms](#)

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