Initial Login Screen/First Time User

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

Login to **nomoreforms**

Company:	Catholic Financial Life
Your First Name:	
Your Last Name:	
Your SSN:	
Assign Yourself a Password:	
Confirm Your Password:	
Client Package Code:	Broker *(case sensitive)*

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:	Catholic Financial Life	
Your SSN:		
Your Password:	••••••••••	Forgot or Change your Password?
Client Package Code:	Broker	(case sensitive)

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).

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
Application for Broker Appt	printable	Incomplete	No
Automatic Deposits	printable	Incomplete	No
Broker Affiliation Form	printable	Incomplete	No
W-9	printable	Incomplete	W-9 No

Completeing 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: Joseph Kohut   **Date:** 08/27/

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 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
Application for Broker Appt	printable	Incomplete	No
Automatic Deposits	printable	Complete	No
Broker Affiliation Form	printable	Complete	No
W-9	printable	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
Application for Broker Appt	printable	Incomplete	No
Automatic Deposits	printable	Complete	No
Broker Affiliation Form	printable	Complete	No
W-9	printable	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.

Select a file to attach:
[Choose File] No file chosen

Provide a descriptive name:

[Add Attachment]

Your attachments will be automatically scanned for viruses.
No files have been attached.

[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"

Select a file to attach:
[Choose File] No file chosen

Provide a descriptive name:

[Add Attachment]

Your attachments will be automatically scanned for viruses.

Attached File	Descriptive Title	Remove
Docusign Signature Option.pdf **	E&O	☐

'**' Denotes Pending Attachment. Awaiting Form Submission.

[Remove] [Done]

[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).

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.
  - o 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