

CLIENT RESOURCE

Client Portal Instructions

A secure workspace to organize your funding process.

Watson Capital clients may receive access to a secure client portal to upload documents, track missing items, monitor deal status, receive updates, and communicate with the Watson Capital team.

GETTING STARTED

- ✓ Submit your deal or application
- ✓ Receive a secure portal invitation
- ✓ Sign in with your email
- ✓ Complete your funding-readiness tasks

WHAT YOU CAN DO

- ✓ Upload documents securely
- ✓ Track missing items & conditions
- ✓ Monitor deal status in real time
- ✓ Message your advisor & processor

STAY ON TRACK

- ✓ Review funding-readiness tasks
- ✓ Clear outstanding items promptly
- ✓ Follow the closing checklist
- ✓ Coordinate draw requests where applicable

SECURITY

- ✓ Documents handled confidentially
- ✓ Access limited to your engagement
- ✓ Submit sensitive files here — not email
- ✓ Used only to evaluate & coordinate funding

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