



## INSTRUCTIONS FOR CREATING A COMPANY RELATIONSHIP AND SPONSORSHIP

*This Quick Guide is intended for **state licensing** purposes. If you are a Federal Institution please see Federal Registry Quick Guides.*

Once the company and individual have applied for their license in the appropriate state, the state may require that a relationship and sponsorship be established by the company. Establishing a relationship with an individual indicates to the regulator that the individual is employed by your company, whereas sponsorship indicates that the company will be supervising the individuals' license. Only the company can establish a relationship and sponsorship of an individual.


### **To Create a Company Relationship**

1. Log into NMLS
2. Select the **FILING** tab
3. In the **Form Filing Home** screen, select **Company Access**.
4. Look to see that the individual you wish to establish a relationship with is listed. If they are not listed you will need to contact the individual to have them grant you access. See the *Granting a Company Access Quick Guide* for steps on this process.
5. The **Active Relationship** column indicates whether or not the company has an active relationship with an individual. If the column indicates "No", note the Individual's ID number you wish to create the relationship with.
6. Select **Company Relationship** and enter the Individual's NMLS ID number.
7. When the individual appears, click the NMLS ID# hyperlink beside their name.
8. Click the **Create Company Relationship** button.
9. Enter the relationship start date and click **Save**.
10. Check the box beside the Registered Location the individual works. At least one registered location must be selected for each individual.

*Tips:* The relationship start date cannot be a future date.  
Only licensed locations with a filing previously submitted will appear.  
To change locations, select the new location **before** removing the old location to avoid the sponsorship being dropped (when applicable)

11. The system will reflect an **Active Company Relationship** between the company and the individual.


Once the relationship has been created, if the relationship start date (employment/association date) needs to be updated, the following steps will allow you to edit the relationship start date.

1. From the Company Relationships section, search for the individual
2. Once selected, select the edit icon () to edit the Relationship
3. Select EDIT next to the employment/association date


Employment/Association Date: 5/1/2005	<input type="button" value="Edit"/>
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4. Enter the correct date and Save

### **To Create a Sponsorship Request**

1. Login to your company's NMLS record.
2. In the welcome screen click  in the upper right hand corner.
3. In the **Form Filing Home** screen click **Company Access**.
4. The **Active Relationship** column lists whether or not an active relationship has been created with an individual. If the column indicates "Yes", note the Individual's ID number you wish to request sponsorship for.

**Note:** There must be an **Active Relationship** before creating a sponsorship request. If the **active relationship** column indicates "No", create the relationship first. For help with this task, see the "Create a Company Relationship" Quick Guide.

5. Click **Company Relationship** and enter the Individual's NMLS ID number.
6. When the correct individual appears, click the NMLS ID# hyperlink beside their name.
7. Under **Active Company Relationship** click the **Edit Filing** icon ()
8. Scroll to the bottom of the **Modify Active Relationship** screen and click **Add Sponsorships**.
9. Select the license(s) the company will sponsor by checking the box, then click **Add to Cart**.

**Note:** A company can only sponsor a license/registration where the company has filed a license/registration.

10. The **Sponsorship Cart** screen will list a breakdown of the licenses to be sponsored and the sponsorship fee associated with each.

**Note:** A sponsorship fee will be charged when a change in sponsorship request is made. Only a company can sponsor a license, therefore the fee is payable by the company. A \$30 processing

fee along with any State Agency sponsorship fee will be charged. (There is no charge for first time sponsorship in NMLS).

11. After review of fees, click the "*Proceed to Invoice*" button.
12. Click the "*Pay Invoice*" button and enter all payment information. Payment can be made by VISA, MC or ACH.
13. The sponsorship request is forwarded to the appropriate regulator for review.

For further assistance, please contact the NMLS Call Center at 240-386-4444.