



CREATING RELATIONSHIPS & SPONSORSHIPS

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 individual's license. Only the company can establish a relationship and sponsorship.

Create a Company Relationship

1. Log in to your company NMLS account and confirm that the individual you need to establish a relationship has granted your company access. The steps below will walk you through confirming access.

Step 1: Click the **Filing** tab.

Step 2: Click the **Access** link in the sub-menu.

Step 3: Filter to obtain the list of access.

Below is a list of Individual records to which your company has access for the date range indicated. You can change the date range to a period not exceeding one year or filter by the Individual's Last Name or NMLS ID. Select the checkbox in the Remove column and click **Remove** at the bottom of the page to remove access to an Individual record(s) for which your company does not have an active Company Relationship, Sponsorship, MU2 Association, or Federal Employment.

Access, which allows you to submit filings on behalf of the Individual, create test enrollments for the Individual and/or view their record within NMLS, is obtained when your company creates the Individual's record in NMLS or the Individual expressly grants your company access to their record.

Filtering Options

Date Access Granted

From: 3/18/2014 To: 3/25/2014

NMLS ID: Last Name:

Remove	NMLS ID	Individual Name	Year of Birth	SSN	Active Relationship?	Active Sponsorship?	Active MU2 Association?	Active Federal Employment?	Date Access Granted
<input type="checkbox"/>	45432	Andrews, Dave Michael	1984	xxx-xx-4555	No	No	No	No	3/25/2014 9:52:06 AM
<input type="checkbox"/>	45540	Lynn, Mike	1984	xxx-xx-2415	No	No	No	No	3/24/2014 9:24:02 AM

NOTE: If the individual you wish to manage has not given your company access, instruct them to do so. You can provide them with the [Providing Access to a Company Quick Guide](#) to the MLO to assist with this process.

2. The Active Relationship column indicates whether or not the company has an active relationship with an individual. If the column indicates “No”, take note of the Individual’s ID number you wish to create the relationship with.
3. Click the **Relationships** link in the sub-menu and enter the **Individual’s NMLS ID** number.

The screenshot shows the NMLS Relationships search interface. At the top, the user is logged in as AndrewsDM. The navigation menu includes 'HOME', 'FILING', 'MLO TESTING & EDUCATION', 'TASKS', 'COMPOSITE VIEW', 'RENEWALS', 'ADMIN', and 'REPORTS'. The 'Relationships' link is highlighted in the sub-menu. The main content area is titled 'Individual Search' and contains a search form with the following fields and options:

- Individual ID:** A text input field with a red box around it and a red number '3' to its left.
- License Number:** A text input field.
- First Name:** A text input field with a checkbox for 'Search by Soundex'.
- Last Name:** A text input field with a checkbox for 'Search by Soundex'.

Below the form, there is a note: "When the Soundex option is selected, the results will include similar names with different spellings (e.g. When searching for "John" the search results will return John and Jon)." At the bottom of the form are 'Search', 'Cancel', and 'Clear' buttons.

4. Click the **NMLS ID number** hyperlink beside their name.
5. Click the **Create Company Relationship** button.
6. Enter the **Employment/Association Date** and click the **Save** button.
7. Check the box beside the Registered Location the individual works. At least one registered location must be selected for each individual.

NOTE: 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).


Company Relationships

Tallie Schmidt (37082)



This page displays any active relationship your company has with the individual named above.

Click the **Create Company Relationship** button to establish a company relationship, if no active relationship exists.


Click  to:

- (i) Add/remove registered locations
- (ii) Add/remove a sponsorship
- (iii) End the company relationship (if an active relationship exists)

Click the [View Inactive](#) link to view any previous relationship(s) between your company and the individual named above.


Active Company Relationship

[View Inactive](#)

Effective Date	Established By
 2/21/2014	schmidtln

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. Click the **Edit** button next to the Employment/Association Date.

Employment/Association Date: 5/1/2005

4. Enter the correct date and click **Save**.

Create a Sponsorship Request

A sponsorship request can only be submitted once a relationship has been established with an individual. The following steps will walk you through submitting a sponsorship request through NMLS.

1. Click the **Relationships** link from the sub-menu and enter the Individual's NMLS ID number.
2. Click the NMLS ID number hyperlink beside their name.

Company Relationships

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Active Company Relationship [View Inactive](#)

Effective Date	Established By
2/21/2014	schmidt1m

3. Under **Active Company Relationship** click the **Edit** icon ().
4. Click the **Add Sponsorships** button at the bottom of the page.
5. Select the license(s) the company will sponsor by checking the box, and then click the **Add to Cart** button.

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

6. 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).

7. After review of fees, click the **Proceed to Invoice** button.
8. Click the **Pay Invoice** button and enter all payment information.

9. The sponsorship request will be forwarded to the appropriate regulator for review.

For further assistance, please contact the NMLS Call Center at 1-855-NMLS-123 (1-855-665-7123).