

# PARTNER CLIENT REFERRAL



## *Overview & Referral Process*

At Growth Partners Arizona (GPAz), we value your partnership and your role in connecting small businesses to accessible capital. Below is an overview of our loan referral process to help set expectations, ensure alignment, and promote transparency throughout the lending journey.

### **Our Referral Process**

We believe that the experience of both the referring partner and the client is paramount to a successful lending journey. That's why our referral process is designed to be clear, responsive, and collaborative — ensuring everyone involved is informed, respected, and supported every step of the way.

- **Step 1: Partner Submits Referral Form** | Submit your referral using the form on our website.
- **Step 2: Automatic Notification Sent** | Partner, referred client, and GPAz Lending Team receive confirmation email.
- **Step 3: Client Profile Created in our CRM System** | Referral data is automatically entered into our internal platform for tracking and workflow.
- **Step 4: Initial Review by Loan Coordinator** | The Loan Coordinator reviews the submission and takes the necessary steps to move client through our lending process.
- **Step 5: Lending Decision** | Once all required documents and information are received, the GPAz Lending Team will make a final decision.

### **Transparent Communication**

Our CRM process will generate notifications for both the referring partner and client throughout the process. This ensures all parties are aware of progress and milestones, eliminating confusion and frustration.

### **What Partners Can Expect**

- Clients will be contacted within 24-48 hours of referral submission.
- Timely updates and transparent communication.
- A dedicated Loan Coordinator managing client intake.
- Clients will be contacted within 24-48 hours of referral submission.
- Referral outcome and loan decision within 7 days of a **Completed** application submission.
- End of Week Updates on Application Status (Only If Client is in an Active Application Status)

***Have Questions? Contact our Loan Coordinator at [eleina@growthpartnersaz.org](mailto:eleina@growthpartnersaz.org)***