NEXA Lending



# BDM ON-BOARDING FLIGHT PLAN

## FAST TRACK TO TAKEOFF FOR BUSINESS DEVELOPMENT MARKETERS

Version. 05.14.2026

NEXA Lending

- Step 1: Review & Discuss W2 Contract
- Step 2: Register via the LOS Portal

# PRE-FLIGHT PREPARE FOR DEPARTURE

***Welcome to NEXA Lending.***

This Business Development Marketer (BDM) Flight Plan outlines the key phases of the onboarding process, ensuring a smooth transition from registration to full activation. Each step is designed to promote clarity, compliance, and confidence as new BDMs begin their journey at NEXA Lending.

Every successful start begins with preparation. In this stage, BDMs complete the essential onboarding tasks that allow NEXA to initiate system setup and access. ***NEXA Lending is the largest independent mortgage brokerage in the nation -and we're proud to have you join our growing team.***

## *CHECKLIST*

- Review and discuss your W2 Employment Contract.
- Sample W2 Onboarding Agreement: View Document
- Sample 1099 Recruiter Agreement: View Document
- Fill out the BDM Onboarding Questionnaire (enter 'N/A' where LO-specific details do not apply).
- Complete registration at Loan Officer Support/onboarding
- Bookmark the onboarding page on your desktop for easy access.

## *GOAL*

Confirm readiness for credential setup and system activation.

**Pre-Boarding ~ Boarding Pass ~ Clearance ~ Flight Status ~ In-Flight Service ~ First Class Access**

## BDM NOTE:

***Your employment contract may reference "Loan Officer." This is standard and applies to Business Development Marketers as well.***

# PRE-BOARDING

## CHECK-IN AND REGISTRATION

***CHECKLIST***

- Complete your Employment Application

***Scheduling***

- Schedule your onboarding appointment through the LOS
- Schedule an appointment using this Calendly link https://calendly.com/stage1_onboarding/live_sponsorship?month=2026-01
    - When entering the Zoom Room, request onboarding assistance from the host. The host will direct you to the Onboarding Front Desk - *let them know you're completing BDM Specialist Onboarding.*

***GOAL***

Complete all applications and scheduling before credential setup.

**Pre-Boarding** ˜ Boarding Pass ˜ Clearance ˜ Flight Status ˜ In-Flight Service ˜ First Class Access

## BDM NOTE:

***Onboarding sessions with confirmed appointments receive priority access. Schedule early to ensure a smooth check-in.***

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- Step 3: Complete Employment Application
- Step 4: Log into LOS Zoom Room
- **Step 5: Understand Fees & Tech Access**
- **Step 6: Provide Valid ID Verification**

# CLEARANCE FOR TAKE-OFF

## VERIFICATION AND SYSTEM SETUP

At this stage, identification, fees, and compliance requirements are completed to ensure readiness for launch.

***CHECKLIST***

- Submit valid, unexpired ID for I-9 verification.
  - View List of Acceptable ID Documents
- Pay required fees:
  - $75 Background & Credit Check
  - $55 Monthly Tech Fee (includes NEXA Email, Google Drive, and LOS Support)

***GOAL***

Achieve full clearance and prepare for activation.

Pre-Boarding ˜ Boarding Pass ˜ **Clearance** ˜
Flight Status ˜ In-Flight Service ˜ First Class Access

## BDM NOTE

***Verify that all IDs and payments are cleared promptly to prevent delays in system activation.***

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- **Step 7: Everee Payroll Setup**

# FLIGHT STATUS

## PAYROLL AND ACTIVATION

To reach out to Payroll/Everee, you can use this link:

**CLICK HERE**

Once clearance is complete, BDMs move into system activation and payroll setup. This ensures that all compensation systems are configured properly.

***CHECKLIST***

- Receive Everee payroll credentials via NEXA email.
  - *Everee is NEXA's payroll platform and the system through which all W2 employees receive payment. You'll receive an activation email with login credentials once on boarding is complete.*
- Log in to Everee to confirm your payment setup and verify credentials are active.
- Ensure all personal and direct deposit information is accurate.

Pre-Boarding ˜ Boarding Pass ˜ Clearance ˜
**Flight Status** ˜ In-Flight Service ˜ First Class Access

## BDM NOTE

***Access the Everee dashboard early to verify settings and avoid payroll delays.***



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- Step 7: Everee Payroll Setup
- **Step 8: Complete MandatoryCompliance Training**

# IN-FLIGHT SERVICE

## CONTINUOUS TRAINING AND GROWTH

After activation, training and engagement become the focus. Mandatory training sessions are required to ensure full integration with NEXA Lending systems.

***REQUIRED TRAINING SESSIONS:***

- The NEXA story and LOS Support – *Mondays, 9:00 AM – 11:00 AM (AZ)*
- Intro to Payroll & Accounting – *Wednesdays, 9:00 AM – 11:00 AM (AZ)*
- Marketing & Compliance 101 – *Thursdays, 9:00 AM – 11:00 AM (AZ)*

*Here is the link to those classes: https://nexamortgage.com/support/*

***GOAL***

Maintain engagement through continued training and support.

Pre-Boarding ˜ Boarding Pass ˜ Clearance ˜
Flight Status ˜ **In-Flight Ser vice** ˜ First Class Access

**BDM NOTE**

***Consistent attendance builds mastery. Confirm completion of all required sessions and maintain communication with your onboarding specialist.***

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# FIRST-CLASS ACCESS

## ARRIVAL AND WELCOME ABOARD

Upon completion of onboarding, BDMs are officially part of the NEXA Lending team. This phase celebrates successful integration and connection to the broader organization.

***WELCOME MESSAGE***

Congratulations and welcome to the NEXA Lending family. As a Business Development Marketer, your leadership and commitment are vital to the continued growth and success of our nationwide team.

***GOAL***

Complete onboarding and officially join the NEXA Lending network.

Pre-Boarding ˜ Boarding Pass ˜ Clearance ˜ Flight Status ˜ In-Flight Service ˜ **First Class Access**

**BDM NOTE**

***Maintain regular communication with your Recruiter and Onboarding Specialist throughout your first 90 days to ensure smooth transition and engagement***

# FINAL APPROACH BDM
## SUPPORT AND CONTACTS

For questions or assistance during onboarding, contact your Onboarding Specialist or Recruiter. They are your primary support crew throughout this process.

**LOS ZOOM ROOM**
*Click Here!!*

**LOAN OFFICER SUPPORT PORTAL**

*LOANOFFICERSUPPORT.COM/ONBOARDING*

**EVEREE PAYROLL SUPPORT**
*PAYROLL.NEXA@EVEREE.COM*

***TOGETHER, WE RISE HIGHER.***

***Welcome aboard, and here's to your successful journey with NEXA Lending.***



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# YOUR FIRST-CLASS CAREER STARTS HERE.



NEXA Lending

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