

Logged in as: [redacted] District: GREATER LOS A
For Margin concessions please use the Margin Discounts/Online 2.5.2

Welcome to the LMA Pricing Portal

Please enter LMA account number to initiate a pricing request:
To request a concession without LMA account number, [click here](#)
To view Reports, [click here](#)
To Refresh the page, [click here](#)

- ▼ Draft Requests
- ▼ Requests Currently in Progress
- ▼ Approved Requests
- ▼ Requests Already

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View

To VIEW information about an existing Concession Request: Depending on the status of the Request, click on Draft Requests, Requests Currently In Progress, or Approved Requests. Find the Request in the table.

Request Number	Account Name	Approved Pricing Value Status	Approved Spread	Approvers	Action
[redacted]	[redacted]	4,200	4.20%	[redacted]	Assign ML
[redacted]	[redacted]	2,500	2.50%	[redacted]	Assign ML
[redacted]	[redacted]	2,325	2.32%	[redacted]	Assign ML

Assign

To ASSIGN an ML Account Number to a Prospect Request:

1. Click the Assign ML # button for that Request.
2. Enter the ML Account Number in the Assign ML Number window and click Submit.

3 Pricing Portal - Web Page Dialog

Assign ML Number

Enter ML Account Number: [input type="text"]

Submit

<http://pensioner.local.intranet>

Start

To START a Concession Request for an existing LMA Account: 1. Type in the LMA Account number and click Submit.

Account Pricing Status

Activation Date: 03/27/2003

Client Name: [redacted]

Account Number: \$110,584

Current Pricing Value: 1.875%

Standard Spread: 2.25%

Concession: 0.000%

Current Net Spread: 2.250%

What would you like to do? [dropdown menu]

Cancel

2. Review the Account information in the Account Pricing Status window.
3. From the dropdown menu, select Concession Request or Request Pricing Value Change.

To START a new Prospect: 1. Click the link after request a concession without LMA account number.

LMA Number Check

You have chosen to proceed without entering LMA Account Number. It is strongly recommended that you obtain LMA account number prior to proceeding as this will simplify the process.

If you would like to proceed without LMA account number, [click here](#)

Back to Main Menu

2. In the LMA Number Check window, click the link after proceed without LMA account number.

LMA Client - Prospect Request

You have chosen to proceed on the basis that the account is a prospect

Account Number: 2501477P

Client Name: [redacted]

Please enter the estimated Pricing Value for the LMA Account * [input type="text"]

Standard Spread: [input type="text"]

Requested Net Spread: [input type="text"]

Cancel Proceed

3. Enter information in the LMA Client - Prospect Request window, then click Proceed.

4. In the Concession Request window, enter the requested Net Spread. (The system calculates the Concession by subtracting the requested Net Spread from the Standard Spread.)
5. Enter Household Statistics.
6. Enter a Reason for Request.
7. Click Save and Proceed.

Concession Request

Rate Type Information:

Current Value: \$1,000,000

Standard Spread: 3.000%

Net Spread: 2.250%

Concession: 0.000%

Annual FA Payment Rate: 50

Household Statistics

Current BR Assets: [input type="text"]

Current Pct: [input type="text"]

Reason for Request: [input type="text"]

Requested: [input type="text"]

Projected BR Assets: [input type="text"]

Projected Pct: [input type="text"]

Cancel Proceed

8. Review the Loan Management Account Concession Request form. Scroll down as necessary.
9. At the bottom, click Select Approver to add Approvers to the Request.

APPROVERS:

Change the Admin Manager and/or Project Admin Manager responsible for your office

Date	Approver	Entry Name	Title	Select Approver	Select Approval
[input type="text"]	[input type="text"]	[input type="text"]	[input type="text"]	[input type="button"]	[input type="button"]