STIFEL LOAN PORTAL

USER GUIDE

Your simple guide to **accessing your Account**, including Loan Balances, Statements, and other key loan information

Updated: October 2024

LOGGING IN

- 1. Access the Stifel Loan Portal through your Treasury Central Account
- 2. Click the "Account Information" tab
- 3. Click the "Loan Portal" option
- 4. Click the "Continue to the Loan Portal" button
- 5. Upon successful login, a new **Dashboard** will appear (right)

*Currently, the following functionality is available in Loan Portal:

- 1. Viewing Outstandings
- 2. Viewing Statements

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Go To:

Payments & Transfers

You will now be taken to the Loan Portal. Are you sure you want to proceed?

Nontinue to the Loan Portal.

Loan Portal

TREASURY central

Account Information

Loan Portal

Quick View Balance Reporti

VIEWING OUTSTANDINGS

- 1. Click on "Lending Services" in the top left corner of the screen and a dropdown menu will appear (right)
- 2. Select "Loans" from the dropdown menu
- Ending Services Administration
 Loans
 Facilities
 Deals
 Bills
- **3.** After selecting "Loans," you will be taken to the **Loans screen** (right)
- Click on the "Live" tab in the middle of the screen

5. After clicking the "Live" tab, all of the Loan Outstandings will appear (right)



- Determine the outstanding that you would like to review and move the cursor to the right side of the line item under the "Actions" column
- As you hover in that area, two icons will appear the first is an Eyeball for a brief summary and the second is a Notepad for in-depth details (right)
- 8. To view the details of the outstanding, **click the Note Pad/Details icon**

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VIEWING OUTSTANDINGS

9. After clicking the Details icon, the Details screen will appear (right)

*The Details screen contains the following tabs:

Loan Details: provides the details of the outstanding

Events: High level transaction history

Interest: Shows the rate, the interest cycle and the amount and due date of the next interest payment

Repayment Schedule: If there is a repayment schedule associated with this outstanding, it will show in this screen

Additional Information: this tab is not being used at this time

10. Lastly, if you select the Adobe Acrobaticon in the middle right side of the screen,a document summary of the outstandingwill be generated in Adobe Acrobat

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Loan Details Feeds Interest	Repayment Schedule Additional In	formation			
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 Click the "Lending Services" option on the top left of the screen and then use the drop down to select "Bills" option



2. After selecting "Bills," you will be taken to the **Bills screen** (right)

*Note that this screen does not show any bills at first – to see bills the user needs to use filters to locate and review bills

- 3. Select the "Advanced Filter" option on the left of the screen
- **4.** Next, the **User must select a calendar date range**, which is done in 3 steps.
- 5. Click the **Calendar icon** in the Bill Date Range section (right)





- 6. A calendar box will appear (right 1)
- 7. Select the **starting date** for the date range using the drop down calendar buttons
- Once the User has selected the start date, the start date will show in the Bill Date Range
- **9.** Select the Calendar icon again (right 2) to bring up the calendar and select the end date





10. After selecting the End Date, **the full Date Range will show** in the Bill Date Range field (right)

Bills All (0) Select Preference Standard Advanced Filter Bill Date Range 01/01/2024 - 10/07/2024

11. Select the **"Apply**" button in the lower right of the screen (right)



12. This pulls up a view of all bills within the Calendar Date Range selected (right)

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- 13. The User can review the details of a bill by moving the cursor over to the Action column on the right
- 14. After moving the cursor and hovering, **select** the Eyeball icon that appears to view the Bill
- The Bill will pop up in a separate window for further review



LOAN PORTAL ASSISTANCE

- If you need help or have questions about Loan Portal, please feel free to reach out to your Relationship Manager or you can use the following steps to contact us via email:
- 2. Click the "Home" icon on the Dashboard page

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Last Login o	n Oct 07, 2024 17:02 CDT			
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	Total Commitment Amount USD 44,434,750.00			
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3. Click the **"Contact Us"** option in the bottom right of the screen

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4. Fill in the details of your request and click the "Start a Conversation" button and your inquiry will be submitted to Stifel Loan Portal Support and they will respond to your request

Contact Us	First Name	Last Rame			
Address .	Final*	Phone Kumber*			
		Phone Number			
501 North Broadway	What can we help you with?"				
Sc. Louis, Missouri 63102 Get Directions	What can we help you with?				
Holiday Hours					
Stilled Back adheres to the Endered Baserse Back holiday closure schedule. Closed on the					
following days in 2024:	For your security, please do not include account numbers, passwords, or other private information.				
	Start a conversation				