

How to Build a Successful SBA Lending Program

that:

- Improves consistency, quality and outcomes
- Moves SBA lending from a fixed cost to an incremental cost
- Eliminates the need to rely solely on in-house dedicated SBA staff to stay abreast of policy and rule changes
- Increases internal resource capacity for other priorities
- Leverages the experience of some of the best SBA talent in the business!



WBD Support – Your Choice!

TESTIMONIALS

“Our collaboration with WBD has been outstanding, serving as a valuable resource for inquiries, facilitating the completion of SBA 504 loans, and aiding in 7(a) packaging. They consistently demonstrate expertise, responsiveness, and punctuality, ensuring our projects stay on course. The WBD team not only contributes supplementary internal knowledge but also assists with intricate projects when needed. Across the board, WBD delivers professional and top-notch services.”

– Cody, Bank First

“Working with WBD has resulted in a more efficient SBA program and helped us make better decisions with faster turnaround times.”

– Morgan, Park Bank

CONNECT WITH US

Contact us with your occasional 7(a) loan program question, or send us an email to receive our newsletter with SBA updates.
LenderServices@wbd.org
 or (608) 316-7143

PREMIER MEMBERSHIP

Ongoing SBA Support

- From simple questions and advice to guidance and tools
- Direct access to exclusive phone and email hotline
 - Resource library with recent updates, notices and more
 - Member discounts on training and tools
 - Priority 7(a) packaging

7(A) STANDARD SERVICE

Support With Managing Your Client

- SBA eligibility review
- Loan structuring assistance
- Ability to interact directly with client or remain behind the scenes

7(A) CONCIERGE SERVICE

Support With Application and Closing

- Prepare 10-tab application for SBA approval and Lender's file
- E-tran system entry and submission
- Loan modification requests
- Prepare SBA loan closing forms
- Review bank-prepared docs for SBA compliance

OTHER SBA SERVICES

SBA Program Support

- File audits for SBA compliance
- Reporting guidance
- Review of Lender's SBA policy
- Universal Purchase Packages
- 7(a) Program Tool Kit

TRAIN YOUR TEAM

Let Us Know Your Needs and We Will Package a Custom Training Session For You!

7(a) Packaging

Other Services

Training

Questions & Support



Why work with WBD?

- Over 100 years of experience in all areas of SBA 7(a) lending for the life of the loan
- Among the most knowledgeable 7(a) staff members in the region having assisted over 80 Lending Institutions during the past several years
- WBD is among the largest SBA Certified Development Companies in the country with an SBA 504 loan portfolio in excess of \$1 Billion
- Vast experience working with numerous industries involving countless financing and servicing requests. We will gladly share our insight and offer workable solutions to your specific situation.
- We are ready to serve you!



MEET OUR TEAM



Becky Schneider – 25 years+ of SBA 7(a) experience working with an SBA Preferred Lender bank and as a Lender Service Provider.
(920) 966-1483 | bschneider@wbd.org



Jill Faber – 16+ years of SBA 7(a) experience working with SBA Preferred Lender banks and as a Lender Service Provider.
(715) 598-6049 | jfaber@wbd.org



Vicki Stone – 20+ years of SBA experience in both the 504 and 7(a) program process.
(920) 966-1494 | vstone@wbd.org



Wenda Roycraft – 35+ years of experience in SBA loan program lending, operations, and process.
(920) 966-1478 | wroycraft@wbd.org



Jason Monnett – 25 years of experience in SBA lending and training.
(920) 966-1479 | jmonnett@wbd.org

How to get started:

Your WBD Loan Officer can connect you with our Lender Services Team

or

Reach out directly to any of our Team Members listed above or in the contact information below

STEP 1: Establish a Lender Service Provider Agreement (LSPA). We have approximately 100 LSPAs in place with over 80 active clients. There is no cost to have an LSPA in place even if you do not have an immediate need.

STEP 2: Once an Agreement is in place, our Team is ready to initiate your projects at any time at (608) 316-7143 or LenderServices@wbd.org

