

WBD Toolkit for SBA 7(a) Lenders

Build Your SBA Program for Success with WBD's Comprehensive 7(a) Loan Toolkit!

Want to prepare SBA compliant credit presentations on a consistent basis?

WBD's essential tools will ensure you meet SBA's underwriting criteria:

- Addendums for Underwriting (based on size & loan type)
- Master Templates - Sources & Uses, Collateral Analysis (SBA maximum advance rates), Pro Forma Balance Sheet
- 7a Structure & Fee Calculator

Need a guide to determine SBA eligibility on complex projects?

WBD's Toolkit will assist you in navigating eligibility and documentation requirements on these specialized financing requests:

- Addendums for Business Acquisition and Debt Refinancing

Want to avoid unnecessary delays in obtaining approval on your SBA 7(a) applications?

WBD's checklists and forms help you avoid screenouts and prepare applications with the best chance of a timely SBA approval:

- Master SBA Application Checklist
- Borrower Forms (Owner & Key Management Form to assist with preparation of SBA Form 1919, Personal Financial Statement, Debt Schedule)

Need a resource for next steps after receiving SBA approval?

WBD's road map will help you close and service loans in compliance with SOP requirements to ensure the SBA guaranty is preserved in the event of future collection:

- Closing and Post-Closing Instructions

Have an existing SBA loan that is deteriorating?

WBD's checklist will help you gather documentation required for preparation of a purchase package to request payment on the SBA guaranty:

- Universal Purchase Package Items Needed

**WBD Toolkit:
\$1,000**

**Discount for Premier
Members: \$500**

**WBD TOOLKIT
UPDATES:
(OPTIONAL)**

**Annual
Subscription
Fee: \$500**

(invoiced at renewal – all renewals to take place January of each year; covers updates to forms for SBA updates throughout course of the year. Forms are shared as/when updates are made)

**Discount for Premier
Members: \$250**

**Reach out to us
for information on
Premier Membership!**

LENDER PRICING SCHEDULE:



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

