

SBA challenges and opportunities

The Small Business Administration is a multi-faceted Federal Government initiative to assist US small businesses. It is the only cabinet-level federal agency dedicated to small business and provides counselling, capital and contracting expertise.

<https://www.sba.gov/about-sba>

The SBA has an extensive range of District Offices nationwide.

<https://www.sba.gov/about-sba/sba-locations/sba-district-offices>

The SBA directly funds four centers for small businesses to contact:

1. Small Business Development Centers
 - a. <https://www.sba.gov/local-assistance/resource-partners/small-business-development-centers-sbdc>
 - b. There are approximately 925 offices nationwide for a small business owner to contact.
2. SCORE Business Mentoring
 - a. <https://www.sba.gov/local-assistance/resource-partners/score-business-mentoring>
3. Women's Business Centers
 - a. <https://www.sba.gov/local-assistance/resource-partners/womens-business-centers>
4. Veterans Business Outreach Business Centers.
 - a. <https://www.sba.gov/local-assistance/resource-partners/veterans-business-outreach-center-vboc-program>

All the SBA small business centers have advisors/consultants that can assist, for free, with the core service a business broker provides, that is, to facilitate the sale of a business from the owner to a buyer.

Lobbying – Exhibit One

When does the MAS, IBBA and CABB etc. start lobbying the US Federal Government to stop hurting the US business brokerage profession?

In April, 2024 the SBA announced the establishment of the Small Business Lending Advisory Council. The purpose of the Small Business Lending Advisory Council is to seek feedback from those involved in the “small business lending ecosystem.”

Here is the perfect opportunity for the US Business Brokerage industry to be heard and represented.

SBA lender Lead Gen tool: Lender Match program – Exhibit Two

The SBA has a program called: Lender Match

<https://www.sba.gov/funding-programs/loans/lender-match-connects-you-lenders>

Lender Match allows a small business owner to go to the SBA website and find an SBA lender that will assist with a loan that includes the sale of a small business or the service a business broker provides.

This program, in early 2024, has now been enhanced.

<https://www.sba.gov/article/2024/03/04/sba-launches-enhanced-lender-match-platform>

SBDC competes head on with the business broker industry. Exhibit Three.

Through the 925+ SBDC's spread throughout the US, the US Taxpayer is funding the SBA and the Federal government agencies mentioned above to compete directly with the US Business Brokerage industry.

Exhibit Two shows a weekly email sent by a local SBDC office in Northern California to the local community to promote the free consulting and advisory services to those business owners that wish to sell their business.

Zero down by a buyer to buy a business – Exhibit Four and page 10.

The SBA now allows a lender to approve an SBA loan to an employee of a business to buy the business with Zero down. That is, the deposit to buy the business comes from the owner/seller providing the capital injection.

Quite simply, this means the owner can hire a broker to sell their business and pay them a success fee or skip the hassles and sell to an employee.

Who helps the employee/buyer check the quality of the financial statements, handle due diligence and do more that the broker provides?

BizBuySell preferred SBDC vendor

To add to the above, BizBuySell is considered a preferred vendor with the SBDC because BizBuySell is delighted to have a business owner pay to advertise on its businesses for sale website platform as they make much more money than from the business brokerage industry.

From: [Herndon, Kevin M.](#)
Subject: Small Business Lending Advisory Council
Date: Monday, April 22, 2024 3:11:08 PM

Hello

Earlier this month the SBA announced the establishment of the Small Business Lending Advisory Council. It is being created to better institutionalize feedback between the SBA and the small business lending ecosystem.

The Lending Council will provide information, advice, and recommendations on facilitating greater access and availability of capital for small businesses, especially in underserved communities, so SBA may better serve America's small businesses and empower the lenders that play a crucial role in their success.

There will be no more than 25 members appointed by the SBA Administrator.

Nominations will be accepted on a rolling basis beginning April 8, 2024, through May 10, 2024. Members will include small businesses, active SBA lenders, lenders outside the SBA network, community leaders, and members of government.

All nominations should be emailed to LendingCouncil@sba.gov with the subject line 2024 Lending Council Nomination. Questions can also be sent to this email address.

According to SBA, reasons to become a member include:

- Engaging with leaders from across the federal government on the issues that most impact American small business lending.
- Showcase your organization's commitment to small businesses and small business owners.
- Partner with the U.S.'s largest supporter of small businesses

The council was created out of the first-ever White House Small Business Lending Summit to institutionalize and deepen partnerships between government, small businesses, leaders, and community leaders.

Warm Regards,

Kevin Herndon
Lender Relations Specialist
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U. S. Small Business Administration
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U.S. Small Business
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Andrew Rogerson

From: Debbie at SBDC <training@norcalsbdc.org>
Sent: Wednesday, February 14, 2024 11:02 AM
To: Andrew Rogerson
Subject: Selling Your Business: Join our Exclusive Series.

NORCAL SBDC PRESENTS



Selling Your Business Series

February 28, March 6, 13, 20 & 27 - 1:00 PM to 2:30 PM

Master the Art of Selling Your Business!

Join our NorCal SBDC Expert, Mike Balstad, for this exciting new webinar series involving everything you need to know about selling your business!

Equip yourself with the tools to navigate this process seamlessly.

**Register
Now &
Secure
Your
Spot!**

Each webinar is valued at \$60 or buy the full bundle for \$250!

What's in Store for You?

1 - Selling Your Business – Some Things to Know

February 28 | 1:00 PM - 2:30 PM

This session will cover the economic and M&A environment, the troubling stats of failed listings and the reasons why, critical information – understanding the difference between enterprise value and income replacement value, what buyers (and the bank) are looking for, due diligence personal/financial/business readiness

COST: \$60 | [Register](#)

2 - Valuation – More Than Just a Number

March 6 | 1:00 PM - 2:30 PM

Valuation models and differences, Industry multiples and ranges, components of business value and variables affecting it, strategic value

COST: \$60 | [Register](#)

3 - Maximizing Value

March 13 | 1:00 PM - 2:30 PM

A roadmap to maximizing the value of your business by focusing on the 4C's and their related value drivers to close value gaps

COST: \$60 | [Register](#)

4 - Win-Win: The Employee Solution

March 20 | 1:00 PM - 2:30 PM

A discussion of the various employee ownership structures and why they may be the best kept secret in selling a business, as well as recent legislation including the Main Street Employee Ownership Act and California Employee Ownership Act and their potential to chart a course to sustainability, continuity, and generational wealth

COST: \$60 | [Register](#)

5 - Selling Your Business - A Checklist

March 27 | 1:00 PM - 2:30 PM

This session will take participants through the steps of selling their business, along with providing checklists and templates they can use to prepare for this final leg of their entrepreneurial journey

COST: \$60 | [Register](#)

Special Offer: Purchase the entire series and save \$50! Get all five webinars for just \$250.

Register Now & Secure Your Spot!



This information brought to you by the Northern California Small Business Development Centers (SBDC). A taxpayer-funded nonprofit dedicated to your small business and the local economy.

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The SBDC program focuses on advising small business clients located in the NorCal SBDC network coverage area. Funded in part through a grant with the Governor's Office of Business and Economic Development. Funded in part through a cooperative agreement with the U.S. Small Business Administration. All opinions, conclusions, or recommendations expressed are those of the author(s) and do not necessarily reflect the views of the SBA or Cal Poly Humboldt Sponsored Programs Foundation.



Reasonable accommodations for persons with disabilities will be made if requested at least 72 hours in advance. Contact: training@Norcalsbdc.org

Norcal SBDC Lead Center | Cal Poly Humboldt University, 1 Harpst Street, Arcata, CA 95521

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U.S. Small Business
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Platform Training **MySBA** Lender Match



MySBA Lender Match Platform Training

Lender Match 2.0

is a free online tool developed by the U.S. Small Business Administration (SBA). It helps connect small businesses with SBA-approved Community Development Financial Institutions (CDFIs) and small lenders to streamline the lending process.

SBICs will also be welcomed into the program with the refresh platform.

The image displays three screenshots of the MySBA Lender Match 2.0 platform. The top screenshot shows the 'About Your Business' form, which includes fields for business name, website URL, tax ID, DUNS number, and a description of the business. The middle screenshot shows the 'Lender Match' registration process, where users provide preliminary information about their business and experience. The bottom screenshot shows the 'Lender Match Request Summary' page, which displays the status of the request and lists potential lenders with their contact information and loan details.

SBA Lender Match Request Summary

Lender	Loan Details	Action
HOMETOWN BANK Interested Lender James Mason 555-555-5555 jmason@hometownbank.com	Hometown Bank Can Best Meet Your Needs Intro Balance transfer APR - 0% for 21 Months Regular Balance transfer APR - 19.24% - 29.99% Variable Balance Transfer Fee - Intro fee 3% of each transfer, (\$5 min) completed within the, First 4 months of account opening. No Annual Fee - \$0.00	✓ You have expressed interest Visit Lender Application
Community Bank Interested Lender Rachel Smith 555-555-5555 rsmith@bank.com	Why apply for a loan from Community Bank? Intro Balance transfer APR - 0% for 21 Months Regular Balance transfer APR - 19.24% - 29.99% Variable Balance Transfer Fee - Intro fee 3% of each transfer, (\$5 min) completed within the, First 4 months of account opening. No Annual Fee - \$0.00	Yes, I am interested
RIDGELINE LENDING Interested Lender Sara Wise 555-555-5555 swise@ridgelinelending.com	A Better Borrowing Experience Intro Balance transfer APR - 0% for 21 Months Regular Balance transfer APR - 19.24% - 29.99% Variable Balance Transfer Fee - Intro fee 3% of each transfer, (\$5 min) completed within the, First 4 months of account opening. No Annual Fee - \$0.00	Yes, I am interested



MySBA Lender Match Platform Training

What's new to Lender Match?

- You can now manage your settings, review matches, opt-in to matches, and provide follow up details
- Lenders are presented to potential borrowers at once with customizable listings
- An initial Know Your Customer (KYC) report will be given to lenders before opting into a lender match
- Lenders who underwrite and fund loans through the platform will be used to provide this feedback to the SBA
- Lenders can pause and activate participation in the program

Lender Match Request Summary [View my Lender Match Details](#)

SBA Lender Match for Parsons Farm Inc
Request #1003

Current Status: Waiting for Matches | Industry: Agriculture | Requested Amount: \$55,000.00 | Use of Funds Description: Buying an Existing Business | [Show Full Summary](#)

What's happening right now?
The lender matches will now review your info and send a decision to provide a interest in your business applying for a 7(a) loan.
Please review and decide on offers as they come in.

[Withdraw Request](#)

Request Submitted | Searching for Lender Interest | Receive Offers from Lenders

Lender Matches 2 | **Documents & Notices** 0

Lender	Loan Details	Action
 HOMETOWN BANK Interested Lender James Mason 555 - 555 - 5555 jmason@hometownbank.com	Hometown Bank CanBest Meet Your Needs Intro Balance transfer APR - 0% for 21 Months Regular Balance transfer APR - 19.24% - 29.99% Variable Balance Transfer Fee - Intro fee 3% of each transfer, (\$5 min) completed within the, First 4 months of account opening. No Annual Fee - \$0.00	You have expressed interest Visit Lender Application
 Community Bank Interested Lender Racheal Smith 555 - 555 - 5555 rsmith@bank.com	Why apply for a loan from Community Bank? Intro Balance transfer APR - 0% for 21 Months Regular Balance transfer APR - 19.24% - 29.99% Variable Balance Transfer Fee - Intro fee 3% of each transfer, (\$5 min) completed within the, First 4 months of account opening. No Annual Fee - \$0.00	Yes, I am Interested
 RIDGELINE LENDING Interested Lender Sara Wise 555 - 555 - 5555 swise@ridgelinelending.com	A Better Borrowing Experience Intro Balance transfer APR - 0% for 21 Months Regular Balance transfer APR - 19.24% - 29.99% Variable Balance Transfer Fee - Intro fee 3% of each transfer, (\$5 min) completed within the, First 4 months of account opening. No Annual Fee - \$0.00	Yes, I am Interested

Example of how matches will be presented to interested small business owners in MySBA



U.S. Small Business
Administration

Training Agenda

- Lender Match Enrollment ----- Slide 5
- Lender Match Settings ----- Slide 7
- Receiving Matches ----- Slide 14
- Working Tasks ----- Slide 15
- Lender Opt-In/Opt-Out Tasks ----- Slide 16
- How a Match is Presented to Potential Borrowers ----- Slide 17
- Borrower Click-through Tasks ----- Slide 18
- What's Coming? ----- Slide 19

Lender Match Enrollment

The screenshot displays the SBA Capital Access Financial System (CAFS) Lender Match Enrollment form. The form is titled "Welcome to CAFS: Creating a New SBA CAFS Account" and is divided into several sections:

- Login Information:** Includes a "User ID" field and a "SBA User ID Rules" link.
- Identity Information:** Includes a "User Type" dropdown menu (with options: Partner, Not Yet Selected, Borrower, SBA Agent, SBA Contractor, SBA Employee), a "Name" field (with sub-fields for First, Middle, Last, and Suffix), and a "Date of Birth" field.
- Contact Information:** Includes a "Country" dropdown menu (with "UNITED STATES" selected), a "Zip" field (with a "Lookup Zip" button), "Street Address Line 1" and "Street Address Line 2" fields, a "City/State" field, a "Phone Number" field (with sub-fields for Country, Area Code, and Phone Number), a "Mobile Phone Number" field (with sub-fields for Country, Area Code, and Mobile Phone Number), a "Fax Number" field (with sub-fields for Fax Country, Area Code, and Fax Number), an "E-Mail Address" field, and a "Re-enter E-Mail Address" field.
- Partner Information:** Includes a "Headquarters Location ID" field (with a "Lookup" button) and a "Job Classification" dropdown menu (with options: Authorizing Official, Loan Service Provider).
- Lender's Authorizing Official (Lookup):** A field for selecting the lender's authorizing official.

The form is part of the SBA Capital Access Financial System (CAFS) and is used for creating a new SBA CAFS account.

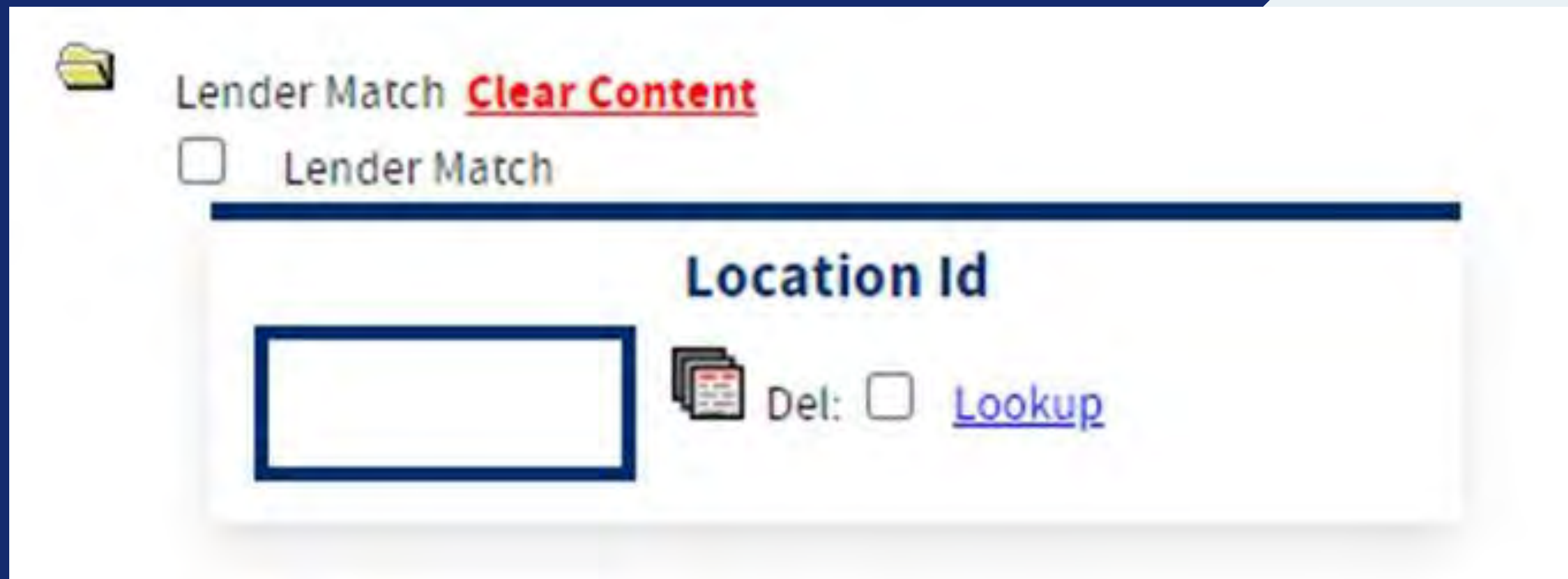
CAFS Partner Accounts

Already registered Lenders (see slide 6)
On how to request access to the new
Lender Match.

New Lenders **(and new SBICs)** can create
partner accounts in the CAFS platform.
Partner Lenders can then
request access to the new Lender
Match.

View all the set-up instructions on the
[CAFS CLS Partner Set up Guide](#).

Lender Match Enrollment



The screenshot shows a web interface for Lender Match enrollment. At the top, there is a folder icon, the text "Lender Match", and a red link "Clear Content". Below this is a checkbox labeled "Lender Match". Underneath the checkbox is a blue-bordered box containing the text "Location Id". To the right of the "Location Id" box is a document icon, the text "Del:", a checkbox, and a blue link "Lookup".

Requesting Access to Lender Match CAFS Systems

1. Select 'Request Access to CAFS Systems' in the Settings Menu.
2. Select the desired roles (Lender Match), enter the Location ID, and click 'Submit'.

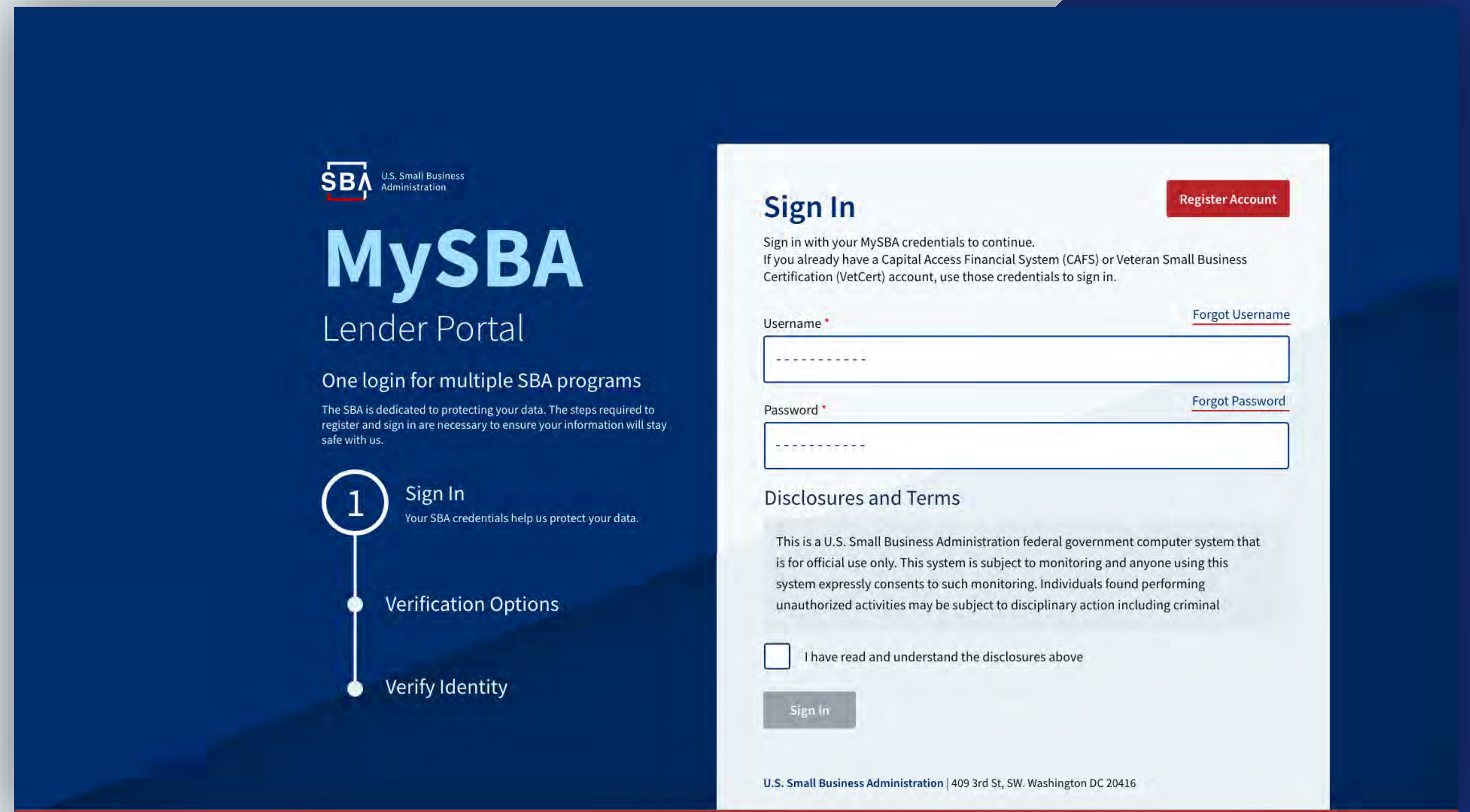
Your Authorizing Official (AO) will need to approve your requests. If you are the only AO, you will approve your requests. It will then go through the approval process with the SBA's Program and IT Security Offices, usually within 1-2 business days. You will receive notification via email once the process is complete.

View all the set-up instructions on the [CAFS CLS Partner Set up Guide](#).

Lenders Portal Sign In

Lenders who already have a CAFS account can sign into the new MySBA Lender Portal at:

lending.sba.gov/lenders/



The screenshot displays the MySBA Lender Portal sign-in interface. On the left, a dark blue sidebar contains the SBA logo, the text "U.S. Small Business Administration", and the "MySBA Lender Portal" title. Below this, it states "One login for multiple SBA programs" and includes a security notice. A vertical progress bar shows three steps: "1 Sign In" (active), "Verification Options", and "Verify Identity". The main content area on the right is white and features a "Sign In" heading, a "Register Account" button, and instructions for signing in with existing credentials. It includes input fields for "Username" and "Password", each with a "Forgot" link. Below the fields is a "Disclosures and Terms" section with a checkbox for agreement and a "Sign In" button. The footer contains the SBA's address: "U.S. Small Business Administration | 409 3rd St, SW, Washington DC 20416".

 U.S. Small Business Administration

MySBA Lender Portal

One login for multiple SBA programs

The SBA is dedicated to protecting your data. The steps required to register and sign in are necessary to ensure your information will stay safe with us.

- 1 Sign In**
Your SBA credentials help us protect your data.
- Verification Options
- Verify Identity

Sign In

[Register Account](#)

Sign in with your MySBA credentials to continue.
If you already have a Capital Access Financial System (CAFS) or Veteran Small Business Certification (VetCert) account, use those credentials to sign in.

Username * [Forgot Username](#)

Password * [Forgot Password](#)

Disclosures and Terms

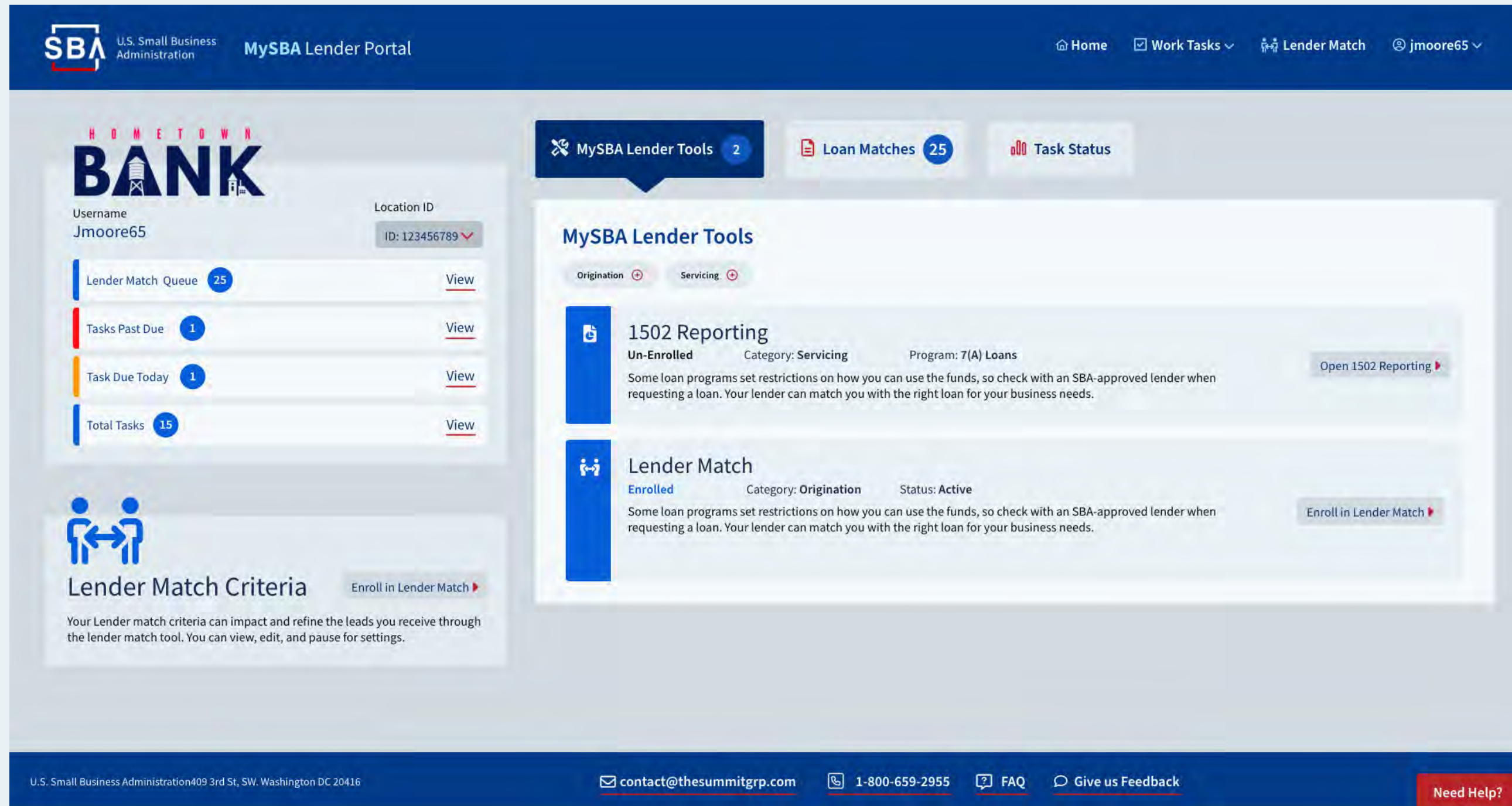
This is a U.S. Small Business Administration federal government computer system that is for official use only. This system is subject to monitoring and anyone using this system expressly consents to such monitoring. Individuals found performing unauthorized activities may be subject to disciplinary action including criminal

☐ I have read and understand the disclosures above

[Sign In](#)

U.S. Small Business Administration | 409 3rd St, SW, Washington DC 20416

Enrollment Inside MySBA



The screenshot displays the MySBA Lender Portal interface. At the top, the SBA logo and "U.S. Small Business Administration" are on the left, and navigation links for Home, Work Tasks, Lender Match, and a user profile (jmoore65) are on the right. The main content area features a sidebar on the left with a "HOMETOWN BANK" logo, a username "Jmoore65", a location ID "123456789", and a queue of tasks: Lender Match Queue (25), Tasks Past Due (1), Task Due Today (1), and Total Tasks (15). Below this is a "Lender Match Criteria" section with an "Enroll in Lender Match" button. The main panel has tabs for "MySBA Lender Tools" (2), "Loan Matches" (25), and "Task Status". Under "MySBA Lender Tools", there are two sections: "1502 Reporting" (Un-Enrolled, Category: Servicing, Program: 7(A) Loans) with an "Open 1502 Reporting" button, and "Lender Match" (Enrolled, Category: Origination, Status: Active) with an "Enroll in Lender Match" button. The footer contains contact information, a phone number (1-800-659-2955), a FAQ link, a feedback link, and a "Need Help?" button.

Lender Match Request

A four-step request form will start the borrower's search for a Lender that can provide an SBA-guaranteed loan.

Lenders Match Settings

Lenders match setting, and enrollment will walk you through seven essential steps to determine what small business you will be matched with.

SBA will attempt to migrate current Lender Match settings into the platform – double-checking your settings is advised.



Enter Loan Range



Select Industry Types



Use of Proceeds



Additional Fields



Areas of Interest



Review Summary

Lender Match Settings

Lender Match Setting Profiles

For each lender account, you can create multiple lender profiles with different settings that can be activated, edited, and created on the Lender Match Setting Profiles page. You will be able to filter match tasks based on these profiles.

Lender match 2.0 will allow adding a webhook to collect match data through an API.

The screenshot displays the MySBA Lender Portal interface. The top navigation bar includes the SBA logo, "U.S. Small Business Administration", "MySBA Lender Portal", and links for Home, Work Tasks, 1502 Reporting, Lender Match, and a user profile (jmoore65). The main content area is titled "Lender Match Setting Profiles" and features a table with the following data:

ID	Setting Profiles	Status	Actions
#2156	Default Settings	Active	Pause Matches View Match Settings Edit Match Settings Manage Webhooks
#2155	Commercial Lending	Active	Pause Matches View Match Settings Edit Match Settings Manage Webhooks
#2154	SBA Guaranteed Loans	Paused	Activate Matches View Match Settings Edit Match Settings Manage Webhooks

Below the table is a link: [Add Settings Profile](#).

An inset window shows the "Lender Match Webhooks" section, titled "Default Settings". It includes tabs for "Webhooks" and "Webhook Logs". The "Webhook Logs" tab is active, displaying a table with columns "Event" and "Date". A "Refresh Logs" button is located in the top right corner of the logs section.

The footer of the portal contains the text: "U.S. Small Business Administration 409 3rd St, SW, Washington DC 20416", the email "contact@thesummitgrp.com", and a "Need Help?" button.

Lender Match Settings

Five Bank Settings Steps

You will use the same form to edit settings when enrolling in the Lender Match program.

You can select a range of minimum and maximum loan amounts. You can be matched with all or a few industry types, use of proceeds, or locations.

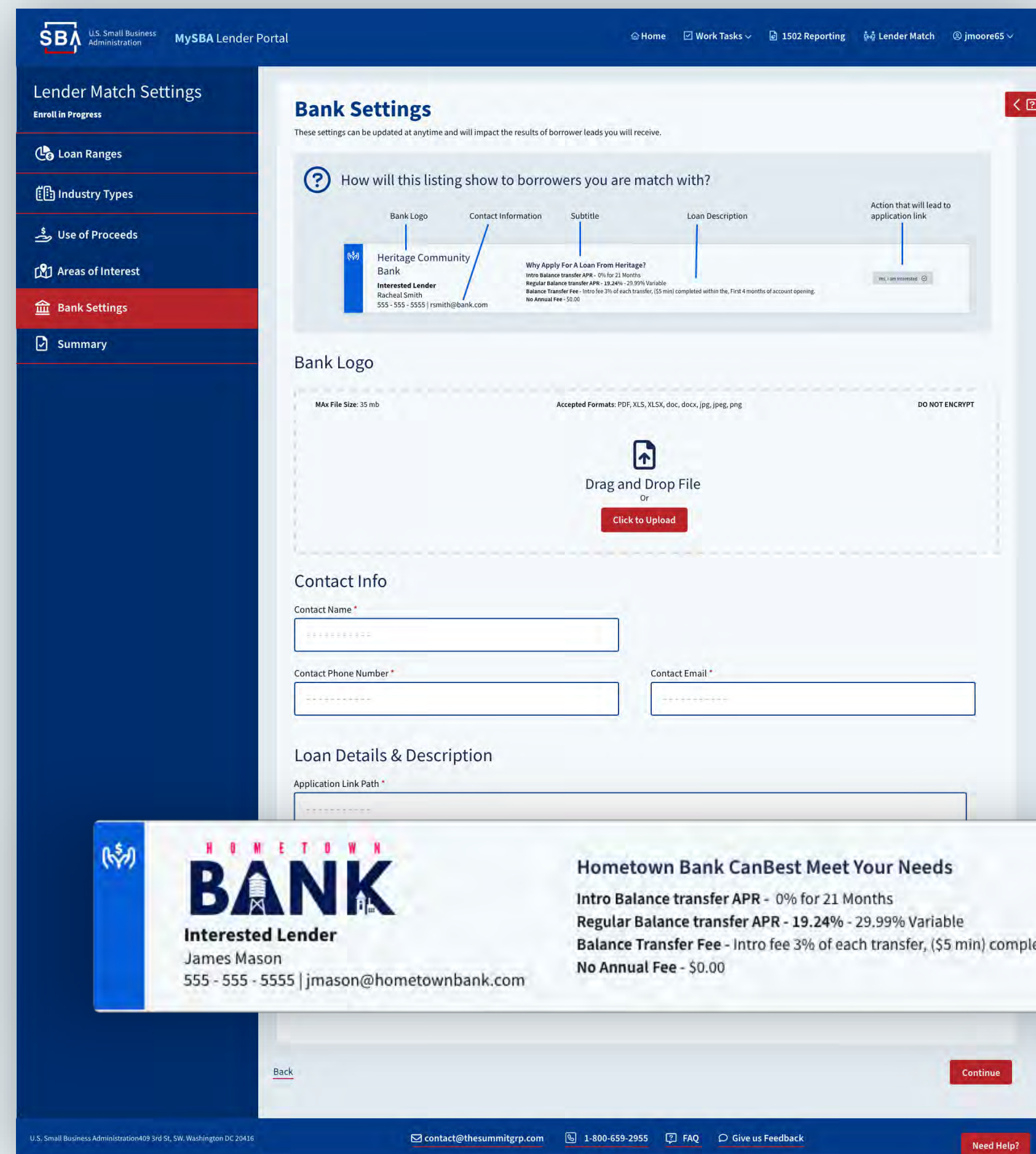
The screenshot displays the MySBA Lender Match Settings interface, which is divided into two main sections: 'Industry Types' and 'Loan Ranges'.

Industry Types: This section allows users to select the industry types they want to service. It includes a question: "Would you like to provide lending to all the industries below?" with radio buttons for "Yes" and "No". Below this, there is a grid of checkboxes for various industry types: Advertising/Marketing, Agriculture, Chemical/Pharmaceutical, Construction, Education, Energy, Financial Services, Entertainment/Recreation, Hospitality, Real Estate, and Manufacturing. A "Continue" button is located at the bottom right of this section.

Loan Ranges: This section allows users to filter matches by a loan range. It includes a question: "Would you like to filter matches by a loan range?" with radio buttons for "Yes" and "No". Below this, there is a slider for "Loan Minimum and Maximum" with a range from \$25,000 to \$6,000,000. The "Loan Minimum" is set to \$75,000.00 and the "Loan Maximum" is set to \$3,575,000.00. A "Continue" button is located at the bottom right of this section.

The interface also features a sidebar on the left with navigation links: "Lender Match Settings", "Loan Ranges", "Industry Types", "Use of Proceeds", "Areas of Interest", "Bank Settings", and "Summary". The top navigation bar includes links for "Home", "Work Tasks", "1502 Reporting", "Lender Match", and a user profile "jmoore65". The footer contains contact information for the U.S. Small Business Administration, including an email address, phone number, and links to the FAQ and "Give us Feedback" page.

Lender Match Settings



Bank Settings

These settings can be updated at anytime and will impact the results of borrower leads you will receive.

How will this listing show to borrowers you are match with?

Bank Logo: Heritage Community Bank, Interested Lender, Rachael Smith, 555 - 555 - 5555 | rsmith@bank.com

Contact Information: Why Apply For A Loan From Heritage? Intro Balance transfer APR - 0% for 21 Months, Regular Balance transfer APR - 19.24% - 29.99% Variable, Balance Transfer Fee - Intro fee 3% of each transfer, (\$5 min) completed within the, First 4 months of account opening, No Annual Fee - \$0.00

Loan Description: Action that will lead to application link

Bank Logo: Max File Size: 35 mb, Accepted Formats: PDF, XLS, XLSX, doc, docx, jpg, jpeg, png, DO NOT ENCRYPT, Drag and Drop File, Click to Upload

Contact Info: Contact Name *, Contact Phone Number *, Contact Email *

Loan Details & Description: Application Link Path *

Back, Continue

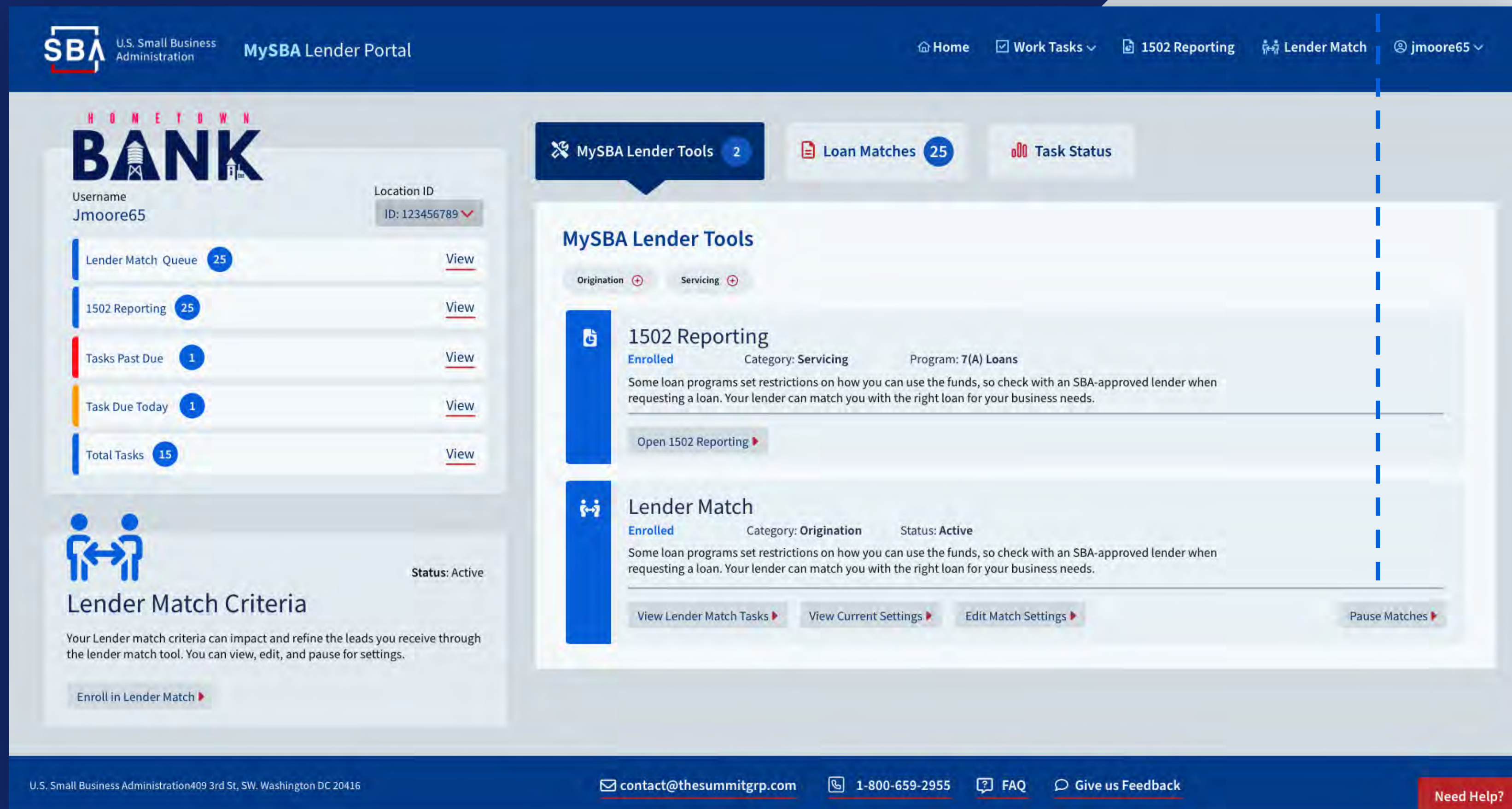
Bank Settings optimize how you will be presented to interested businesses
Your institution can customize your match listing by adding the following:

- Institution logo
- Contact details
- A subtitle
- A description of your offerings
- An application URL

Note: You must enter data for these new settings in the platform.

Pause Lender Match Activity

You can pause activity for the Lender Match program at any time on the Lender dashboard.



The screenshot displays the MySBA Lender Portal interface. The top navigation bar includes the SBA logo, "U.S. Small Business Administration", "MySBA Lender Portal", and user navigation links for Home, Work Tasks, 1502 Reporting, Lender Match, and a user profile for jmoore65. The main content area is divided into several sections:

- Left Sidebar:** Features the "HOMETOWN BANK" logo, user information (Username: Jmoore65, Location ID: 123456789), and a list of tasks with counts and "View" links: Lender Match Queue (25), 1502 Reporting (25), Tasks Past Due (1), Task Due Today (1), and Total Tasks (15).
- Top Navigation:** Includes "MySBA Lender Tools" (2), "Loan Matches" (25), and "Task Status".
- Main Content Area:**
 - MySBA Lender Tools:** A section with tabs for "Origination" and "Servicing". It contains two cards:
 - 1502 Reporting:** Shows "Enrolled" status, "Category: Servicing", and "Program: 7(A) Loans". It includes a description and an "Open 1502 Reporting" button.
 - Lender Match:** Shows "Enrolled" status, "Category: Origination", and "Status: Active". It includes a description and three buttons: "View Lender Match Tasks", "View Current Settings", and "Edit Match Settings". A "Pause Matches" button is also visible at the bottom right of this section.
 - Lender Match Criteria:** A section with an icon of two people, a "Status: Active" indicator, a description of the criteria, and an "Enroll in Lender Match" button.

The footer contains contact information: "U.S. Small Business Administration 409 3rd St. SW. Washington DC 20416", email "contact@thesummitgrp.com", phone "1-800-659-2955", and links for "FAQ" and "Give us Feedback". A red "Need Help?" button is located in the bottom right corner.

Match Email

Lender Partners will continue to receive an email with all the details of a match request, including contact information.



U.S. Small Business
Administration

New Potential Match

Email This Lead

A new potential match is ready for you to review.

Business name: John Doe's Pizza

Business website: <https://johndoespizza.com>

Business description: We serve new york style pizza for live events in our city park.

Industry: Accommodation and Food Services

Experience: 5+ years

Requested amount: \$50000.00

Use of funds: Purchasing Equipment

Use of funds description: buying new pizza ovens will help us triple our capacity.

Written business plan: None

Financial projections: True

Generating revenue: None

Revenue: \$250000.0

Working Tasks

In the new MySBA Lender Portal, you will be notified of matches in our task system. Match review tasks can be assigned to individuals or groups. Advanced sorting and filtering are available to your team to access match tasks.

My Tasks

Search All Columns

More Filters Type: All High Priority Critical Non Actionable Past Due My Custom Views

Request Type	Task	Sub Task	Reference	Name	Task Status	Priority	Due Date	Actions
Inbox	Post Submission	Capture (main)	#694393629	James S	In Progress	High	May 3, 2023	Actions
Lender Match	Lender Match	Review Borrower Match	#2159	Mason Pizza LLC	In Progress	Medium	May 3, 2023	Actions
Lender Match	Lender Match	Borrower Contact	#2167	Brenton Dance Studio	In Progress	Medium	May 3, 2023	Actions

Rows per page: 5 1-2 of 6

1 Search tasks

2 Tasks filters

3 The actions button allows you to unassign the task, assign the task and view a match task

Lender Opt-In/Opt-Out Tasks

MySBA Lender Portal

Request ID: 2159 | Current Task: Review Borrower Match | Assigned to: Jon Smith | Business Name: Mason Pizza LLC | Product: Lender Match Requests | Requested Amount: \$75,000 | Loan Risk: N/A

Lender Opt In/Opt Out

Borrower Match Review

Interested Lender Results will be presented to the borrower on Monday, May 5th 2024 at 12:00 AM EST

1 Match Details

Business Name	2159
Tax ID	XXXX-XX-3725
DUNS	580407303
Business Website	https://mybusiness.com
Business Description	Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo.
Bankruptcy/Insolvency?	No
Franchise	No
Number of Employees	25
Number of Jobs Retained	5
Number of Jobs Created	12
City	Jamestown
State	TX
Zip	57463

2 Borrower Match Review

3 Match Criteria

4 Risk Review

5 Match Request Details

6 Opt-In/ Opt-Out Action

What is happening now?
If you choose to opt in to this match, your listing will be included in the list of interested Lenders presented to the borrower. They will then choose a Lender to finish applying for a loan with. If they choose your offering they will be directed to your loan application provided in the Lender Match settings and you will be notified with a new task that includes the borrowers contact details.

Close Opt Out Opt In

1

Match Request Details

This section will include the details of the request made by a business owner. The red arrow will expand to show all the details of a request.

2

Match Opt-In Deadline

This timeframe shows you when all opted-in matches will be presented to the potential borrower.

3

Match Criteria

This timeframe shows you when all opted-in matches will be presented to the potential borrower.

4

Risk Review

This tab will include the potential borrower's basic KYC and risk review results, which can help influence your opt-in decision.

5

Match Request Details

Here, you can review the information provided by the potential borrower in the match request.

6

Opt-In/ Opt-Out Action

Finally, you will decide to opt in or out of a lender match. You will be excluded from the match listing if action is not taken.

How a Match is Presented to Potential Borrowers

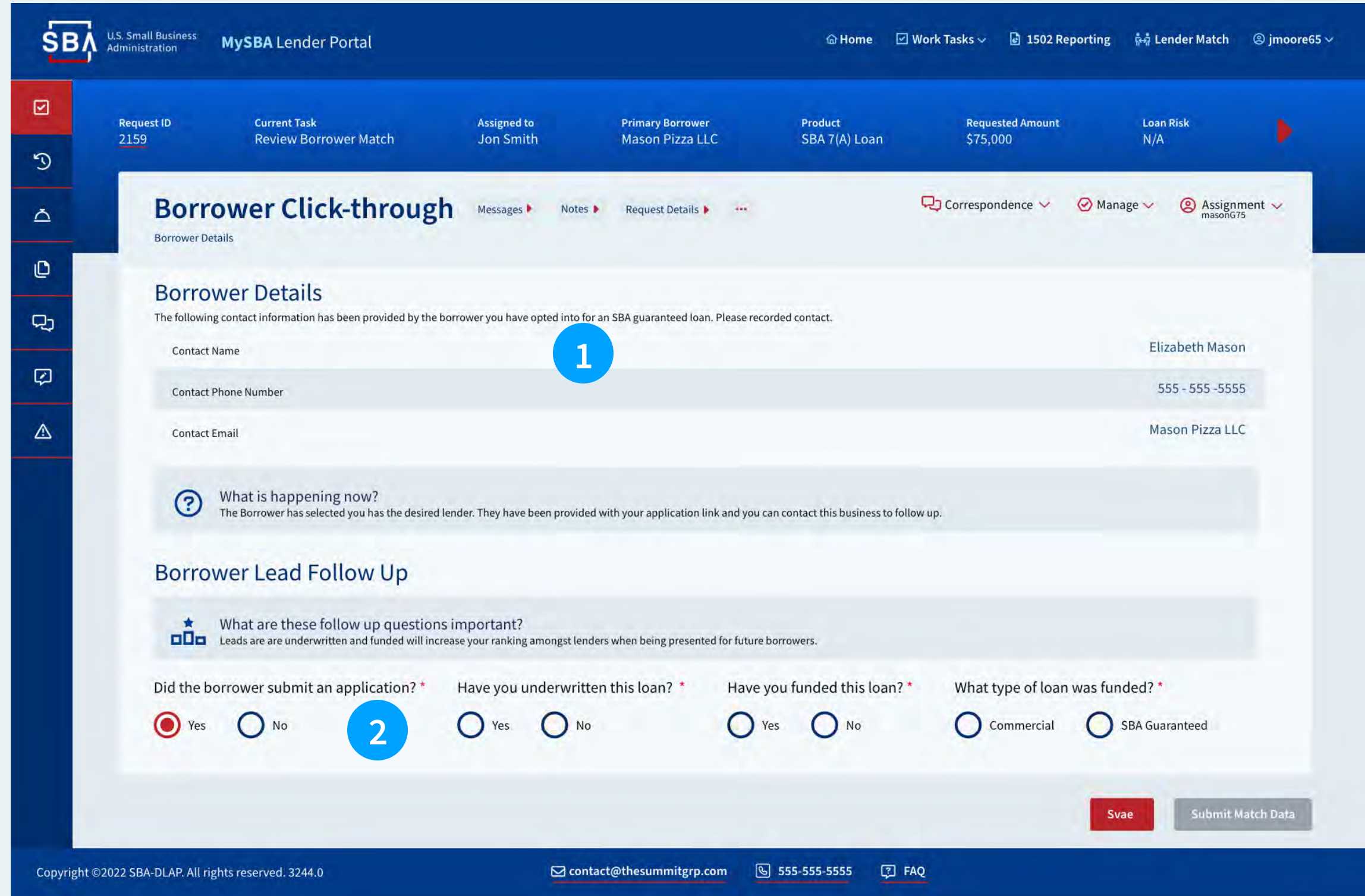
After two business days have passed, all lenders who choose to opt into a match will be presented on the borrowers.

Potential borrowers can review all the matches and express interest to multiple lenders. Clicking the interested button will navigate the user to your desired application link.

The screenshot displays the SBA Lender Match Request Summary page. At the top, the SBA logo and navigation links (Home, Loan Accounts, Messages, Jenny Moore, EN) are visible. The main heading is "Lender Match Request Summary" with a link to "View my Lender Match Details". Below this, a summary card for "SBA Lender Match for Parsons Farm Inc" (Request #1003) shows the current status as "Waiting for Matches", industry as "Agriculture", requested amount as "\$55,000.00", and use of funds as "Buying an Existing Business". A "Show Full Summary" link is provided. A section titled "What's happening right now?" explains that lender matches will review the info and send a decision to provide a loan. A "Withdraw Request" button is also present. A progress bar shows the steps: "Request Submitted" (completed), "Searching for Lender Interest" (current), and "Receive Offers from Lenders" (upcoming). Below the progress bar, there are buttons for "Lender Matches" (2) and "Documents & Notices" (0). The main content area is a table of lender matches:

Lender	Loan Details	Action
HOMETOWN BANK Interested Lender James Mason 555 - 555 - 5555 jmason@hometownbank.com	Hometown Bank CanBest Meet Your Needs Intro Balance transfer APR - 0% for 21 Months Regular Balance transfer APR - 19.24% - 29.99% Variable Balance Transfer Fee - Intro fee 3% of each transfer, (\$5 min) completed within the, First 4 months of account opening. No Annual Fee - \$0.00	You have expressed interest Visit Lender Application
Community Bank Interested Lender Racheal Smith 555 - 555 - 5555 rsmith@bank.com	Why apply for a loan from Community Bank? Intro Balance transfer APR - 0% for 21 Months Regular Balance transfer APR - 19.24% - 29.99% Variable Balance Transfer Fee - Intro fee 3% of each transfer, (\$5 min) completed within the, First 4 months of account opening. No Annual Fee - \$0.00	Yes, I am Interested
RIDGELINE LENDING Interested Lender Sara Wice	A Better Borrowing Experience Intro Balance transfer APR - 0% for 21 Months Regular Balance transfer APR - 19.24% - 29.99% Variable Balance Transfer Fee - Intro fee 3% of each transfer, (\$5 min) completed within the, First 4 months of account opening.	Yes, I am Interested

Borrower Click-through Tasks



Request ID 2159 **Current Task** Review Borrower Match **Assigned to** Jon Smith **Primary Borrower** Mason Pizza LLC **Product** SBA 7(A) Loan **Requested Amount** \$75,000 **Loan Risk** N/A

Borrower Click-through

Borrower Details

The following contact information has been provided by the borrower you have opted into for an SBA guaranteed loan. Please record contact.

Contact Name Elizabeth Mason

Contact Phone Number 555 - 555 -5555

Contact Email Mason Pizza LLC

What is happening now?
The Borrower has selected you as the desired lender. They have been provided with your application link and you can contact this business to follow up.

Borrower Lead Follow Up

What are these follow up questions important?
Leads are underwritten and funded will increase your ranking amongst lenders when being presented for future borrowers.

Did the borrower submit an application? * ☒ Yes ☐ No

Have you underwritten this loan? * ☐ Yes ☐ No

Have you funded this loan? * ☐ Yes ☐ No

What type of loan was funded? * ☐ Commercial ☐ SBA Guaranteed

Save **Submit Match Data**

Borrower Click-through Tasks

These tasks are generated when a borrower expresses interest in you as a lender.

1

Borrower Contact Details

The borrower's contact details are provided for reference as you service the loan application.

2

Follow Up Questions

These questions are designed to collect data on how you work the loan application for this borrower. The questions will impact your sort order when being presented to future matches.

What's Coming...

- Ability to setup multiple bank matching profiles
- **API integration** – the platform will make API calls to consume leads and provide feedback to SBA.
- In addition, the platform will make available a webhook to allow you to build an integrated application experience from the SBA portal.

This feature won't be available for the initial roll-out.

The image shows two screenshots of the MySBA Lender Match portal. The top screenshot displays the 'Lender Match Settings' page, which features a table with columns for 'Settings Profile', 'Status', and 'Actions'. The table lists three profiles: 'Default Settings' (Active), 'More settings' (Active), and 'My Settings' (Draft). Each row has an 'Actions' dropdown menu. Below the table is a link to 'Add Settings Profile'. The bottom screenshot shows the 'Lender Match Webhook' configuration page. It includes a 'Back to Settings' link, tabs for 'Webhook Settings' and 'Webhook Logs', and a form with fields for 'Webhook Enabled' (radio buttons for Yes/No), 'URL', and 'Secret'. A 'Submit Changes' button is at the bottom of the form. The portal's header and footer are also visible, showing the SBA logo, navigation links, and contact information.

Settings Profile	Status	Actions
Default Settings	Active	Actions ▾
More settings	Active	Actions ▾
My Settings	Draft	Actions ▾

[Add Settings Profile](#)

Lender Match Webhook

Webhook Settings | [Webhook Logs](#)

Webhook Enabled*

☒ Yes ☐ No

URL*

Secret*

[Submit Changes](#)