



**TSoftPlus™**

Your Next  
SBA Lending  
Solution

**Meet Bill.**



**Wolters Kluwer**  
Financial Services



# Introducing TSoftPlus

**from Wolters Kluwer Financial Services**

**Meet Bill.** He's a lender with a growing number of clients who want to apply for SBA loans. Bill expects many of them will qualify, too. Of course, he wants to help them. The problem is, Bill is overloaded as it is and the compliance and regulatory requirements of SBA lending really add up. If only there were a way to cut through the paperwork without cutting out any steps.

**Now there is.**

## TSoftPlus

**TSoftPlus** from Wolters Kluwer Financial Services is designed specifically to support the SBA loan processing demands of banks, credit unions and other financial institutions. We based **TSoftPlus** on our proven field experience with TSoft SBA FormMaster+ users around the country. We listened to lenders like Bill who want to expand capacity without the burden of additional staff expense. We also heard from lenders who want to enter into SBA lending. We then designed a product that would meet the needs of the whole spectrum of financial institutions offering SBA lending.

**TSoftPlus** takes a leap forward with a flexible browser-based tool and integrated time-saving features throughout the application process – from origination through funding. **TSoftPlus** supports multiple SBA loan types and offers features that allow our clients to handle a wider variety of requirements. We added features like Quick Quotes for fast response to prospective borrowers, PDF output files for easy printing and e-mailing, loans to co-borrowers including eligible passive companies, and global cash flow analysis. Data entry is streamlined as users navigate easily between online forms and their own client database. Financial analysis is easier too, with Microsoft Excel® integrated right into the application. And, it fully integrates with SBA's authorization wizards using Microsoft Word®. There's even a built-in online loan submissions and response feature that connects to SBA's E-Tran.

**Finally, an SBA solution that makes life easier without sacrificing anything in compliance or risk management. Designed for lenders like Bill – and his clients.**

## Lenders say TSoftPlus Delivers

- **Greater Efficiency**  
Easy to learn, easy to use.  
Streamlined SBA loan processing with browser-based User Interface (UI) and integration to Microsoft Office®
- **Strengthened Compliance**  
Built-in compliance features, one-step data entry and all required SBA forms
- **Cost-effectiveness**  
Affordable pricing that supports even small volume lending
- **Faster Response Times**  
Streamlined processing and online submission to SBA's E-Tran



## A Flexible Solution

We designed **TSoftPlus** to be a flexible application that can accommodate any SBA lending volume. **TSoftPlus** can be used independently; there's no need for any previous TSoft or other application experience. And, TSoft SBA FormMaster+ users can easily transition to this new browser-based application to experience the improvements in SBA loan processing incorporated into this state-of-the-art product.

### New SBA Lenders

Many SBA lenders have experienced unprecedented SBA loan demand resulting in backlogs as staff struggles to keep up with the SBA's popular programs. Wolters Kluwer Financial Services has built on our experience with the TSoft SBA FormMaster+ solution to further improve the quality and efficiency of SBA lending. Our new **TSoftPlus** solution makes processing SBA loan applications seamless from the beginning through funding. **TSoftPlus** helps lenders efficiently originate, underwrite, approve, authorize, close and fund SBA loans.

### Large Financial Institutions

Large, multi-branch organizations have unique SBA lending requirements. **TSoftPlus** is a robust, scalable solution that helps standardize and streamline the SBA lending practice while ensuring rigorous compliance management.

**TSoftPlus** helps large institutions standardize processes, ensures compliance and improves efficiency with a streamlined, integrated application. It can be difficult to maintain consistency in the SBA lending process among multiple locations and departments. Lenders will appreciate easy to use features, including a browser-based user interface and the application's seamless integration of financial analysis, the SBA forms library, the SBA Wizards and their own customer database.



Meet Bill, a happier SBA lender.



## Community Banks & Credit Unions

**TSoftPlus** is also suited for community banks and credit unions starting or expanding SBA lending. Many SBA lenders have experienced unprecedented SBA loan demand resulting in backlogs. **TSoftPlus** helps these lenders improve their service as it streamlines loan processing. Wolters Kluwer Financial Services has built on our experience with our existing TSoft SBA FormMaster+ solution to further improve the quality and efficiency of SBA lending in our new **TSoftPlus** product.

**TSoftPlus** makes processing SBA loan applications seamless from the beginning through funding. **TSoftPlus** helps efficiently originate, underwrite, approve, authorize, close and fund SBA loans.

“Lenders just like me, or Bill, say they want everything for an SBA application at our fingertips. Then, if we could just click ‘send’ for the submission, that would be icing on the cake. . . The results are in – WKFS has iced it!”

- Shannon Vinson, National Bank of California

# Easy Transition from TSoft SBA FormMaster+

TSoft SBA FormMaster+ users will find all the familiar features they rely upon plus a new browser-based interface and significant improvements to streamline and tailor their SBA loan processing. We worked with TSoft SBA FormMaster+ users to add the product features most requested to make SBA lending more flexible and more efficient.

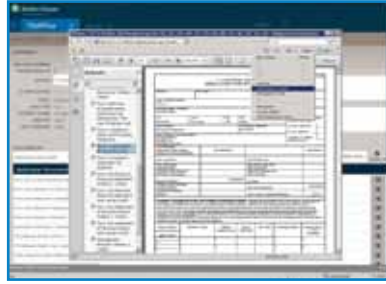
## Leading the Way in Compliance

Wolters Kluwer Financial Services leads the industry in compliance solutions. **TSoftPlus** integrates compliance throughout the application while moving seamlessly to Microsoft Office® applications for financial analysis and the SBA authorization wizards with data integration to ensure accuracy. **TSoftPlus** offers significant efficiency and process improvements without any sacrifice to compliance and risk management.

Wolters Kluwer Financial Services Compliance Warranty is exclusive in the industry. With more than 15,000 financial customers worldwide, Wolters Kluwer Financial Services is the leader in financial products that help institutions manage their compliance process.



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## TSoftPlus Features at a Glance

- New browser-based client user interface – just point to a URL on your own server for added security
- SQL Server database of customers and transactions
- Improved security with login and encryption
- Role-based security
- Organization, policy and product setup tool
- Loan status dashboard
- Eligibility determination
- Enter data directly on SBA Forms
- Easy access to all SBA Forms
- SBA loan authorization wizards
- All required SBA Calcs readily available
- Customizable financial analysis with Microsoft Excel®
- RMA ratio analysis fully integrated
- Global cash flow analysis including affiliates
- Loans to co-borrowers including eligible passive companies
- PDF document format

- Easy to create, print and e-mail PDF files in a single document package
- Quick Quotes for fast response to prospects
- Online SBA application submission and response with SBA's E-Tran

## Coming Soon

- Pipeline reporting
- Borrower Web Portal for data collection
- 51 jurisdiction closing documents using Wolters Kluwer Financial Services compliance content (i.e. mortgages, deed of trusts, security agreements, etc.)
- Interface development kit
- Barcoding

**Contact us for more information at 1-800-552-9410 or contact your Account Executive from Wolters Kluwer Financial Services.**  
[www.WoltersKluwerFS.com/TSoftPlus](http://www.WoltersKluwerFS.com/TSoftPlus)



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