

CASH Suite™ Borrower Portal

Commercial lending is a fast-paced business. Borrowers want a seamless experience combined with the speed, convenience, and security of modern digital tools. Our CASH Suite Borrower Portal helps you meet client expectations by providing an online access point for borrowers to interact with you throughout the loan process—all from your website!

Today's borrowers prefer virtual interactions and rely on social media and online searches to find financial institutions that offer digital tools. Our CASH Suite Borrower Portal levels the playing field by delivering a high-tech experience without the need to invest heavily in advanced technology capabilities.

New and existing clients can easily find you with a social media-friendly entry point to your financial institution. The portal enables borrowers to upload tax returns and other sensitive documentation through a secure, branded portal, giving them the 'anytime, anywhere' access they demand. The portal also includes functionality that allows prospective borrowers to complete an online form and submit a loan inquiry from your website.

Are you just getting started with an online presence? Our CASH Suite Borrower Portal is right-sized for all commercial lenders and can be scaled to meet you where you are.

With our CASH Suite Borrower Portal, you can:

- Provide your clients with the secure transmission and delivery of sensitive documents
- Give your clients a better experience by enabling them to easily upload documents from their computer or mobile phone
- Meet prospective clients where they are—online—starting with a loan inquiry right on your website
- Support your marketing strategies such as social media, online advertising, and email campaigns, by helping you attract more borrowers with the ease of online inquiries
- Feel secure knowing that you are leveraging the preferred commercial lending software solution—CASH Suite



Are your commercial lending clients demanding an efficient, secure way to start a loan inquiry and deliver important documents?

CASH Suite Borrower Portal will improve your internal processes by:

- Providing an efficient and secure method to obtain required documents for new commercial loans and annual reviews
- Importing related data into CASH Suite without the need for data entry, limiting the operational disruption from errors
- Eliminating the need to physically collect and carry sensitive documents or receive them via unsecured email

Your CASH Suite Borrower Portal setup and configuration can be completed in a matter of hours or days—including branding, basic setup and mobile functionality. Our world-class Wolters Kluwer support team will work with you every step of the way to ensure you are ready to meet market demand.

For more information on how CASH Suite Borrower Portal can help you increase your commercial lending volume, call 800-397-2341 or visit WoltersKluwer.com/CASH. More information is waiting for you!

Potential and existing clients can find and quickly complete this online inquiry from your website.

Online Inquiry: DLBMVMN Inquiry expires on 5/29/22 at 2:22PM

Business Information

Legal Name *	DBA Name
My Main Street LLC	Main Street Properties
Business TIN *	Year Established
88-8123-56	1990
Nature of Business	NAICS Code
Property Lessors	531200 - Lessors of nonresidential buildings (ex
Entity Type	Are you thinking of changing your business structure?
Limited Liability Company	No
Date Ownership Began	Business Website
03/01/1990	www.mainstreetlao.com

Select the document(s) to be requested

Company/Contact	Document Type	Tax Year	Document Date
Acme Athletic Gear, Inc.	Business Financial Statement	12/31/2021	
Acme Athletic Gear, Inc.	Business Tax Return	2021	
Sam Samuelson	Personal Tax Return	2021	

Summary

Company/Contact	Document Type	Tax Year	Document Date
Acme Athletic Gear, Inc.	Business Financial Statement	12/31/2021	
Acme Athletic Gear, Inc.	Business Tax Return	2021	
Sam Samuelson	Personal Tax Return	2021	

Message to Recipient

Primary Entity: Acme Athletic Gear, Inc. (XX-XXX0254)

Requested Document(s)

Requester: Sam Samuelson (samuelson@acme.com)

Request Date: 12/6/2021

Requestor: Dave Brown

Audit Report

Preview Print

< Back Finish Cancel

Lenders can easily request documents in CASH Suite using the built-in request wizard.

About Wolters Kluwer Governance, Risk & Compliance

Governance, Risk & Compliance is a division of Wolters Kluwer, which provides legal and banking professionals with solutions to help ensure compliance with ever-changing regulatory and legal obligations, manage risk, increase efficiency, and produce better business outcomes. GRC offers a portfolio of technology-enabled expert services and solutions focused on legal entity compliance, legal operations management, banking product compliance, and banking regulatory compliance.

Wolters Kluwer (WKL) is a global leader in professional information, software solutions, and services for the healthcare; tax and accounting; governance, risk and compliance; and legal and regulatory sectors. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with specialized technology and services. Wolters Kluwer reported 2021 annual revenues of €4.8 billion. The group serves customers in over 180 countries, maintains operations in over 40 countries, and employs approximately 19,800 people worldwide. The company is headquartered in Alphen aan den Rijn, the Netherlands.

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For more information about our solutions and organization, visit WoltersKluwer.com.