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TSoftPlus Forms List

Document Phase	Name	7a							504	Auto-Selection Rule
		7(a) - Non-Delegated	7(a) - Delegated	Express Programs		CAPLine - Non-Delegated	CAPLine - Delegated	Small Loan Advantage Initiative		
				SBA Express	Export Express					
Application	Additional Borrower Addendum	X	X	X	X	X	X	X		Auto-selects once per loan transaction if there are multiple borrowers.
Application / Closing	Form 159 Fee Disclosure and Compensation Agreement -[Agent Name]	X	X	X	X	X	X	X	X	Auto-selects once per SBA Agent specified. This is a Loan Information question (Application Phase).
Application	Form 160-Resolution of Board of Directors of Corporation - [Name]	X	X	X	X	X	X	X	X	Auto-selects for each borrower of entity type "Corporation" or "Limited Liability Company".
Application	Form 160A - Certificate As To Partners-[Name]	X	X	X	X	X	X	X	X	Auto-selects for each borrower of entity type "Limited Partnership", "Limited Liability Partnership", "General Partnership".
Application	Change of Ownership	X	X	X	X	X	X	X		Auto-selects once per loan transaction if the user indicates there is a 'Change of Ownership'. This is a Document Options question (Application Phase).
Application	Form 413-Personal Financial Statement-[Individual Name]	X	X	X	X	X	X	X	X	Auto-selects for each individual who is a borrower, principal (owner with >=20% ownership), or guarantor.
Application	Management Resume-[Owner's Name]	X	X	X	X	X	X	X	X	Auto-selects for each principal (owner with >= 20% ownership), and for Borrowers who are Individuals.
Application	CIP Adequate Notice-[Individual Name]	X	X	X	X	X	X	X	X	Auto-selects for each individual who is a borrower, principal (owner with >=20% ownership), or guarantor.
Application	Credit Elsewhere Rules Statement	X	X	X	X	X	X	X		Auto-selects once per loan transaction.
Application	IRS Form 4506 Request for Copy of Tax Return - [Name and Form Number]	X	X	X	X	X	X	X	X	Auto-selects for each borrower, owner, guarantor, or other party specified on the Loan Information page (Requested Tax Forms section).
Application	IRS Form 4506C Request for Transcript of Tax Return-IVES [Name and Form Number]	X	X	X	X	X	X	X	X	Auto-selects for each borrower, owner, guarantor, or other party specified on the Loan Information page (Requested Tax Forms section).
Application	Consent to the Use of Tax Return Information	X	X	X	X	X	X	X	X	Auto-selects for each borrower, owner, or guarantor requiring a Form 4506 or 4506C IVES.
Application	IRS W-9-Request for Taxpayer Identification Number and Certification-[Name]	X	X	X	X	X	X	X	X	Auto-selects for each borrower, owner, or guarantor specified on the Loan Information page (Requested Tax Forms
Application	G-845-Document Verification Request-[Borrower Name]	X	X	X	X	X	X	X	X	Auto-selects for each borrower or guarantor who is an individual and not a US Citizen.

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Application	G-845-Supplement-[Individual Name]	X	X	X	X	X	X	X	X	Auto-selects for each borrower or guarantor who is an individual, not a US Citizen, and user indicates the G-845 Supplement Document is required. This is a Document Options question. (Application Phase).
Application	G-845-Alien Status Release Authorization-[Individual Name]	X	X	X	X	X	X	X	X	Auto-selects for each borrower or guarantor who is an individual and not a US Citizen.
Application	Form 1919-Borrower Information Form - [Individual Name]	X	X	X	X	X	X	X	X	Auto-selects for each borrower and for each guarantor who is an operating company on the loan.
Application	Form 1920-Application for Guaranty for All 7(a) Programs	X	X	X	X	X	X	X		Auto-selects once per loan transaction.
Application	SBA 7(a) Loan Submission Checklist	X	X	X	X	X	X	X		Auto-selects once per loan transaction. Use when loan amounts >$350,000.
Application	Small Loan Submission Checklist	X	X	X	X	X	X	X		Auto-selects once per loan transaction. Use when loan amounts <=$350,000.
Application	E-Tran-Additional Required Data	X	X	X	X	X	X	X		Auto-selects once per loan transaction.
Application	E-Tran Optional Terms and Conditions Data	X	X	X	X	X	X	X		Auto-selects once per loan transaction.
Application	CDC Checklist For Submitting Real Estate Appraisal								X	Auto-selects once per loan transaction.
Application	CDC Checklist for Submitting Environmental Investigation								X	Auto-selects once per loan transaction.
Application	CDC Checklist For Submitting Equipment Appraisal								X	Auto-selects once per loan transaction.
Application	Form 1244-Application for 504 Loan								X	Auto-selects once per loan transaction.
Application	SBA Form 2462-Addendum to Franchise Agreement	X	X	X	X	X	X	X	X	Auto-selects when the borrowing business is a franchise.
Application	SBA Form 2464-Annual Franchisor Certification	X	X	X	X	X	X	X	X	The Form 2464 Annual Franchisor Certification was created for those franchises listed in the Directory that need to certify annually to remain on the SBA Franchise Directory. This replaces Form 2463.
Authorization	SBA Express Authorization			X	X					Auto-selects once per loan transaction.
Closing	Form 147 Note	X	X	X	X	X	X	X		Auto-selects once per loan transaction.

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Closing	Form 148-Guaranty-[Guarantor Name]	X	X	X	X	X	X	X	X	Auto-selects for each Unlimited Guarantor associated to the transaction. If "Combine Guaranty Agreements" checkbox is selected on the Parties page, all Unlimited Guarantors will be combined on a single guaranty.
Closing	Form 148L-Limited Guaranty-[Guarantor Name]	X	X	X	X	X	X	X	X	Auto-selects for each Limited Guarantor associated to the transaction. If "Combine
Closing	Form 155-Standby Creditor's Agreement-[Creditor Name]	X	X	X	X	X	X	X	X	Auto-selects for each standby creditor associated to the transaction.
Closing	Form 160A - Certificate As To Partners - [Name]	X	X	X	X	X	X	X	X	Auto-selects for each borrower of entity type "Limited Partnership", "Limited Liability Partnership", "General Partnership".
Closing	Form 601-Compliance Agreement-[Borrower Name]	X	X	X	X	X	X	X	X	Auto-selects for each borrower if Form 601-Compliance Agreement for Construction Loan Required is requested. This is a Document Options question (Closing Phase).
Closing	Form 1050-Settlement Sheet-[Borrower Name]	X	X			X	X			Auto-selects for each borrower if Provide the Settlement Sheet Document is checked in Document Options or for the first or final disbursement when the loan amount is over $350,000.
Closing	Form 1050-Settlement Sheet Supplement	X	X			X	X			The form must be used for the first or final disbursement on all standard 7(a) loans with a loan amount over $350,000 and may be used for all 7(a) loans for all disbursements.
Closing	Form 1059-Security Agreement-[Name]	X	X	X	X	X	X	X		Auto-selects once for each personal property security agreeent owner associated to the transaction on the Collateral page.
Closing	Form 722-Equal Employment Opportunity	X	X	X	X	X	X	X	X	Auto-selects once per loan transaction.
Closing	Environmental Questionnaire-[Property Address]	X	X	X	X	X	X	X	X	Auto-selects for each piece of real estate that is non-residential.
Closing	Certification of Child Support Obligations-[Owner Name]	X	X			X	X	X	X	Auto-selects for each owner with >= 50% ownership and if owner has child support obligations question is checked under the Owner tab. This is a Document Options question (Closing Phase).

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Closing	Borrower's Certification	X	X	X	X	X	X	X		Auto-selects once per loan transaction.
Closing	IRS W-9-Request for Taxpayer Identification Number and Certification-[Name]	X	X	X	X	X	X	X	X	Auto-selects for each borrower, owner, or guarantor specified on the Loan Information page (Requested Tax Forms section).
Closing	Loan Agreement	X	X	X	X	X	X	X		Auto-selects once per loan transaction. The loan agreement autoselects only if the "Use SBA Loan Agreement" is checked in Administration.
Closing	Designation of Homestead and Affidavit of Non-Homestead (TX)	X	X	X	X	X	X	X	X	Auto-selects when there is at least one residential real estate collateral located in Texas that is a non-homestead.
Closing	Notice Pursuant to Section 505_5 of Title 33 of MRSA-ME	X	X	X	X	X	X	X	X	Auto-selected with real estate collateral located in Maine, and the lender that holds the primary lien on the real estate is not the current lender.
Closing	Real Estate Property Insurance Disclosure-CA	X	X	X	X	X	X	X	X	Auto selects when the loan has any real estate collateral where the collateral is located in California or California is the applicable law state.
Closing	Form 1505 Note CDC 504 Loans								X	Auto-selects once per loan transaction.
Closing	UCC Financing Statement Addendum IACA	X	X	X	X	X	X	X	X	Auto-selects when there is collateral and "Property Held in Trust" is selected on the Options Data fill in page.
Closing	UCC Financing Statement Addendum IACA 2013	X	X	X	X	X	X	X	X	Auto-selects for collateral type Fixtures or Timber to Cut and "Collateral Documentation Should Be Filed in the Real Estate Records" selected on the Collateral page and there is collateral owner who is Sole proprietorship.
Closing	UCC Financing Statement Collateral Description	X	X	X	X	X	X	X	X	Auto-selects when "UCC Filing Separate Collateral Description" checked on the Options Data Fill-in page and there is collateral.
Closing	UCC Financing Statement Filing Authorization	X	X	X	X	X	X	X	X	Auto-selects when "Prepare a UCC Financing Statement Filing Authorization" is selected on the Options Data fill and there is collateral.
Closing	UCC Financing Statement IACA	X	X	X	X	X	X	X	X	Auto-selects when there is collateral and "Create UCC to Perfect Security Instrument" is selected on the Options Data fill in page.

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Closing	UCC Financing Statement IACA 2013	X	X	X	X	X	X	X	X	Auto-selects when there is a collateral.
Post-Closing	Form 2289-Borrower and Operating Company Certification								X	Auto-selects once per loan transaction.
Post-Closing	Form 1528-Resolution of Board of Directors								X	Auto-selects once per loan transaction.
Post-Closing	Form 1086-Secondary Participation Guaranty	X	X	X	X	X	X	X		Auto-selects once per loan transaction if Guaranteed Interest Being Sold is checked. This is a Document Options question (Post-Closing Phase).
Post-Closing	Form 2237-7a Loan Post Approval Action Checklist	X	X	X	X	X	X	X		Auto-selects once per loan transaction if
Post-Closing	Secondary Market Bid Form	X	X	X	X	X	X	X		Auto-selects once per loan transaction.
Post-Closing	Transfer of Participation Agreement	X	X	X	X	X	X	X		Auto-selects once per loan transaction if Transfer of Participation document is requested. This is a Document Options question (Post-Closing Phase).

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