Next-level financing advisory relationships start here

Do your business clients need help securing the funding they need to achieve their goals? With the [CPA Business Funding Portal], now your firm can help. Deliver comprehensive financing advisory services to your clients and better support their business funding needs (while also earning revenue) through SBA 7(a) loans, term loans, and revenue-based financing – all from one central hub.

The portal makes it easy to confidently deliver these services and deepen client relationships. It's packed with user-friendly capabilities that give your firm the power to:

- Share a self-service link for clients to apply for funding
- Quickly prequalify clients for funding
- Communicate efficiently with multiple clients at once
- Refer clients to a funding specialist to continue the financing application process

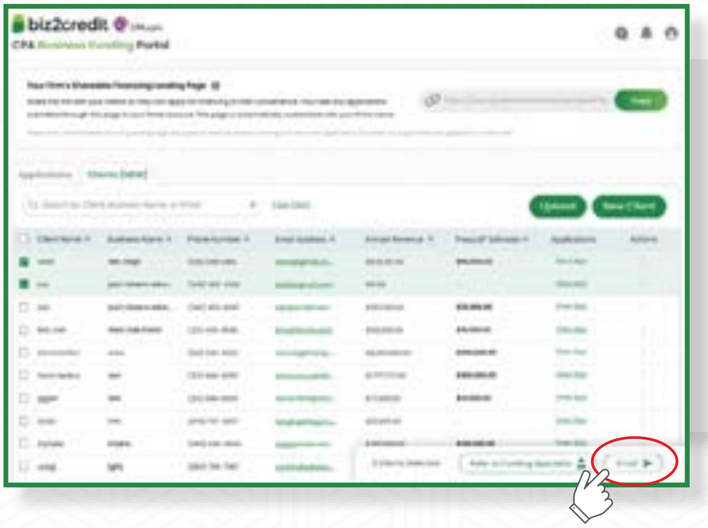
The CPA Business Funding Portal simplifies the financing application process and offers clear visibility into the loan process every step of the way – for both firms and clients.

Shareable Landing Page*

Generate a self-service financing page to share with your clients. Clients can apply directly for financing using your link. After a client submits an application, your firm can track applications right in the Portal dashboard. Once funded, you'll earn commission from eligible, funded deals.

Prequalification Estimate*

You can easily prequalify clients for funding using the Prequalification Estimate feature. Simply input your client's estimated annual revenue, answer a prompt about their time in business, and FICO score. Once the information is saved, you'll receive a prequalification estimate to better advise your client upfront on their financing options.

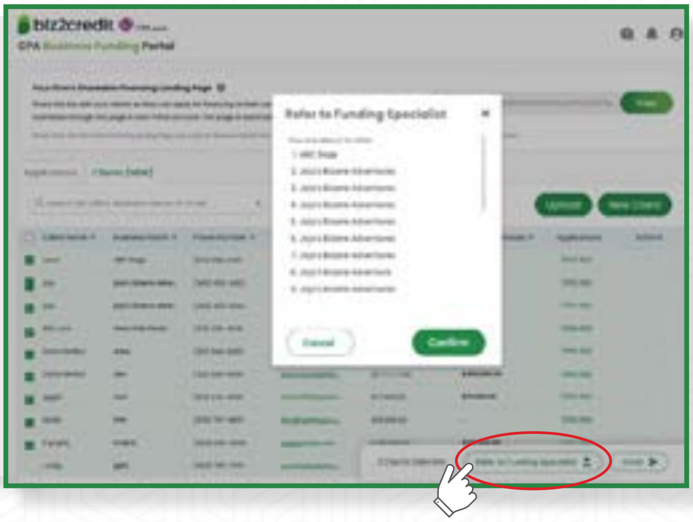


Bulk Email Messaging

Communicate easily with multiple clients at once using the Bulk Email feature. Provide updates on their applications, follow up on required documentation, or share your self-service financing page for quick applications using our client invitation email template.

Refer to a Funding Specialist

Simplify the financing process for your small business clients by referring them directly to a funding specialist. Even if you don't have time to manage the application yourself, you can easily select your client(s) from the *'Clients'* table and click *'Refer to Funding Specialist'*. Our funding specialists will then take over and complete the application process. Once the application is submitted, you'll receive a notification and can monitor progress through the *'Applications'* dashboard.



***The Sharable Landing Page and Prequalification Estimate is only for Term Loans and Revenue-Based Financing at this time.**

Discover how the **CPA Business Funding Portal** can enhance your advisory services and sign up for free.

Join our **upcoming product demonstration** to see how this powerful tool can help you provide financing solutions for your clients and grow your practice.