preferred vendor list

built by your SBA thought leaders

Loan Origination System (LOS)

An LOS system streamlines SBA lending operations by managing applications, organizing required documents, generating SBA-compliant forms, and connecting directly to systems like E-Tran. It reduces manual work, improves accuracy, speeds up decisions, and gives real-time visibility into every stage of the loan.

Lead Generation & Referral Partners

Strong referral partners understand your lending appetite and consistently bring in well-qualified borrowers, reducing time spent on unproductive leads and creating a steady pipeline of high-quality opportunities. Partners may come in the form of business brokers, accountants, industry advisors or even other lending institutions.

Closing, Packaging & Eligibility Support

Vendors that support SBA closing, packaging, and eligibility help gather required documents, verify borrower information, prepare SBA-compliant packages, and complete tasks like Tax Transcript Verifications. Many lenders also use Lender Service Providers (LSPs) for full back-office support, including eligibility reviews and closing coordination.

Due Diligence, Collateralization & Lien Verification

Using SBA specialized due diligence vendors for lien due diligence and collateral filings helps lenders quickly identify existing liens, properly perfect their security interests and verify perfection in a timely manner. These partners handle UCC filings, mortgage filings, rolling-stock titling, and post-close searches.

Appraisal, Environmental & Valuation Vendors

Using qualified third-party vendors for appraisals, environmental reviews, equipment valuations and business valuations adds objectivity and strengthens SBA loans. These assessments confirm collateral value, uncover risks, and validate business viability, supporting sound underwriting and compliance.

Data Solutions to Support Intelligence

Leveraging data providers like FranData and Lumos gives SBA lenders access to reliable, standardized industry and franchise insights, improving risk assessment, identifying trends, and strengthening credit decisions.

Portfolio Management & Servicing

Integrating specialized vendors for portfolio management, debtor monitoring, continuation filings, and servicing helps SBA lenders improve efficiency, reduce risk, and maintain compliance. These partners provide ongoing visibility into portfolio performance, proactively flag credit issues, ensure UCC filings remain current, and streamline servicing tasks.

Secondary Market & Loan Sale Vendors

Secondary marketing vendors help streamline loan sales by supporting packaging, pricing, and compliance. Their expertise reduces turnaround time, improves execution, and helps lenders maximize liquidity and sale value.

Construction Management & Site Visit Providers

Using a vendor for construction management and site visits helps lenders keep projects on track and aligned with loan terms. They provide progress oversight, validate fund usage, and flag issues early.

Insurance Vendors

SBA loans often require insurance to protect collateral and reduce risk, such as hazard, liability, flood (if applicable), and sometimes key person or life insurance. These coverages help safeguard assets, ensure business continuity, and support lender and SBA requirements throughout the life of the loan.

Legal Counsel

Enlisting SBA-specific legal counsel for complex closings helps lenders navigate nuanced requirements, structure deals properly, and avoid costly compliance issues. Their expertise ensures accurate documentation, adherence to SBA SOPs, and smoother closings—reducing risk and supporting defensible loan files.