

PPP Loan Forgiveness Solution **FOR LENDERS**

Features Overview

	Core	Core+	Premier
Convenient Borrower Experience			
Simple but secure borrower access with assisted automated process and logic-based data entry and calculations.	✓	✓	✓
Instructional guidance for borrowers on application completion, with timely updates, including accessible videos, FAQs, emails, and alerts by Moss Adams professionals.	✓	✓	✓
Drag-and-drop ability for loading supporting data and providing preliminary forgiveness amount, with ability to make inquiries of institution personnel and adjust workflow for specific borrower needs.	✓	✓	✓
Digital signature verification incorporated into the workflow, if desired.	✓	✓	✓
Notification of loan status.	✓	✓	✓
Flexible Support for your Organization			
Customized cloud-based workflow for your organization on industry-leading Nintex® Process Platform.	✓	✓	✓
Auto-generated submission package to SBA and for records retention in printable and legible format, with copy provided to borrower.	✓	✓	✓
Enhanced up-front anticipated forgiveness, with ability to make inquiries via automated help desk.	✓	✓*	✓
Status reporting of the forgiveness pipeline.	✓	✓	✓
Forgiveness calculation updates based on governmental guidance.	✓	✓	✓
Professional Guidance and Reviews			
Live webinar lender training on latest guidance addressing forgiveness challenges, with Q&As and follow-up.	✓	✓	✓
Robust review mechanism within workflow with ability to provide detailed instruction on corrections to the borrower.	✓	✓	✓
Assistance in updating system data for SBA submission decision on forgiveness and completion of Form 1502.	✓	✓	✓
EXPANDED FEATURES & SUPPORT			
Platform Adjustments			
Post-go-live workflow and borrower interface optimization related to forgiveness calculation updates after publication of governmental guidance.		✓*	✓
Staff Augmentation			
Moss Adams professionals conduct review of documentation provided for accuracy in comparison of application data to supporting information, assisting lender in resolution of forgiveness process, with no direct borrower contact; only for designated timeline.		✓*	✓
Execution Flexibility			
Ability to reroute institution workflow to Moss Adams professionals due to excessive volume.			✓
Help Desk			
Help-desk option for challenging borrower questions, supported by Moss Adams professionals, with institution-approved responses on areas that lack clear guidance.			✓

*Duration and volume TBD. These options may be added for a designated period of time and/or number of loans. The lender may also establish review criteria, such as having Moss Adams review only the loans over a designated dollar threshold, with the lender reviewing the remaining loans. Premier option has additional enhanced services based on your desired specifications and budget.