VENTURES +

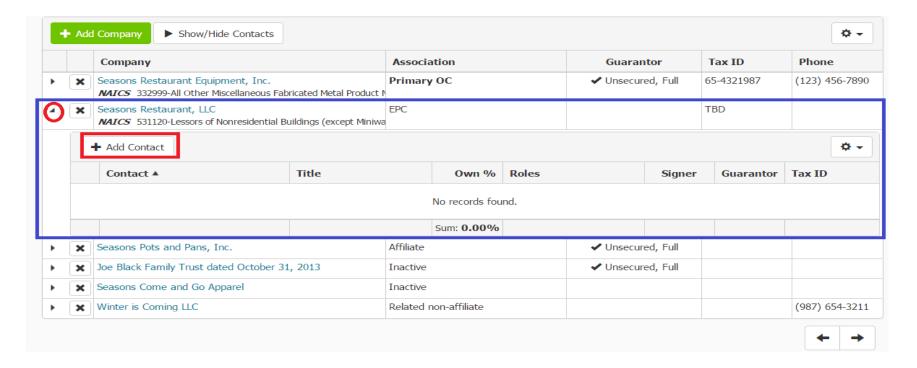## Setting Signature Blocks: Entities Owning Entities

Step 1

- The entity that owns another entity needs to be created on the master Companies table for your loan.
  - ❖In this scenario, the *Joe Black Family Trust dated October 31, 2013* is 100% owner of *Seasons Restaurant LLC* (the EPC).
  - ❖The trust has already been created in the table below

		Company	Association	Guarantor	Tax ID	Phone
▸	✖	Seasons Restaurant Equipment, Inc. **NAICS** 332999-All Other Miscellaneous Fabricated Metal Product N	**Primary OC**	✔ Unsecured, Full	65-4321987	(123) 456-7890
▸	✖	Seasons Restaurant, LLC **NAICS** 531120-Lessors of Nonresidential Buildings (except Miniwa	EPC		TBD	
▸	✖	Seasons Pots and Pans, Inc.	Affiliate	✔ Unsecured, Full		
▸	✖	Joe Black Family Trust dated October 31, 2013	Inactive	✔ Unsecured, Full		
▸	✖	Seasons Come and Go Apparel	Inactive			
▸	✖	Winter is Coming LLC	Related non-affiliate			(987) 654-3211

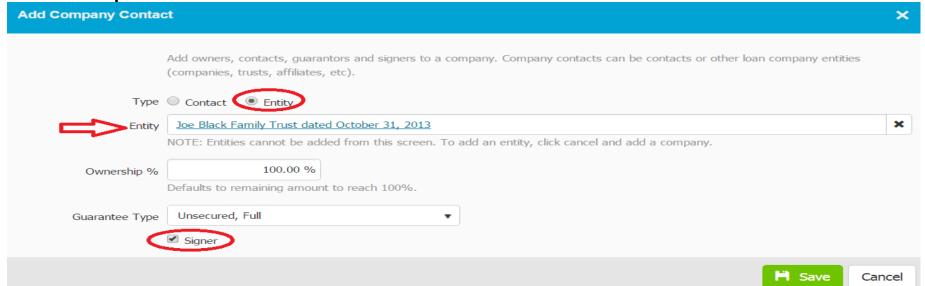+ Add Company   ▶ Show/Hide Contacts

Step 2

- Click on the dark triangle located on the same row of the entity to expand and view your contacts.
- Click on **Add Contact**
  - ❖ In this scenario we're clicking on the triangle for Seasons Restaurant, LLC.

Step 3

- A pop-up will appear for you to select the type of contact you want to create.
- Click on the radio button for **Entity** and then select your Entity from the list of available companies in the drop-down.
  - ❖In this scenario the Trust was selected and it owns 100% of the LLC
- If your entity will be signing click on the **Signer** box.
- Click on the **Save** button; you will be redirected to your Companies table.

Add Company Contact

Add owners, contacts, guarantors and signers to a company. Company contacts can be contacts or other loan company entities (companies, trusts, affiliates, etc).

Type ○ Contact ◉ Entity

Entity Joe Black Family Trust dated October 31, 2013

NOTE: Entities cannot be added from this screen. To add an entity, click cancel and add a company.

Ownership % 100.00 %

Defaults to remaining amount to reach 100%.

Guarantee Type Unsecured, Full
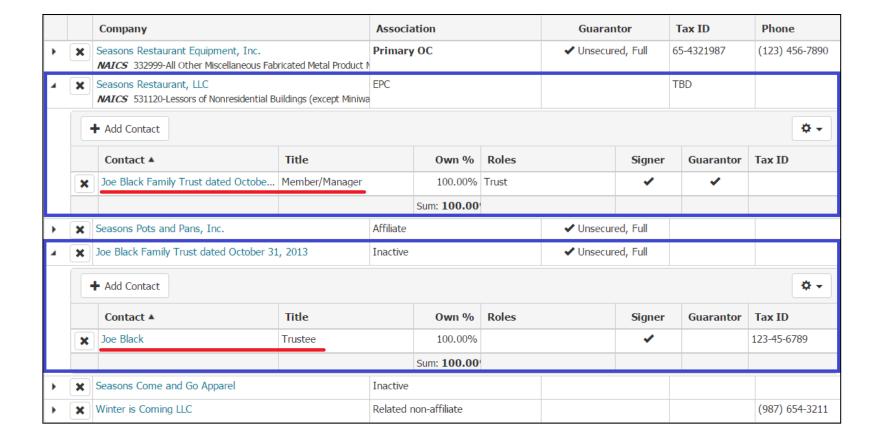
☑ Signer

Save Cancel

Review

- Stop and review your entity information
  - ❖ In this scenario the Trust is Member/Manager so the title needs to be changed. Click on the hyperlink to correct the title and click on **Save** so the correct title displays on the table.

Review

- Verify your Company Contacts are reflecting proper **Titles**
  - ❖In this scenario you also want to verify your Trustees have been added to the Trust and reflected as signers.

		Company	Association	Guarantor	Tax ID	Phone
▶	✖	Seasons Restaurant Equipment, Inc. **NAICS** 332999-All Other Miscellaneous Fabricated Metal Product N	**Primary OC**	✔ Unsecured, Full	65-4321987	(123) 456-7890
◢	✖	Seasons Restaurant, LLC **NAICS** 531120-Lessors of Nonresidential Buildings (except Miniwa	EPC		TBD	

			✚ Add Contact					✿ ▾
		Contact ▲	Title	Own %	Roles	Signer	Guarantor	Tax ID
	✖	Joe Black Family Trust dated Octobe...	Member/Manager	100.00%	Trust	✔	✔	
				Sum: **100.00**				

		Company	Association	Guarantor	Tax ID	Phone
▶	✖	Seasons Pots and Pans, Inc.	Affiliate	✔ Unsecured, Full		
◢	✖	Joe Black Family Trust dated October 31, 2013	Inactive	✔ Unsecured, Full		

			✚ Add Contact					✿ ▾
		Contact ▲	Title	Own %	Roles	Signer	Guarantor	Tax ID
	✖	Joe Black	Trustee	100.00%		✔		123-45-6789
				Sum: **100.00**				

		Company	Association	Guarantor	Tax ID	Phone
▶	✖	Seasons Come and Go Apparel	Inactive			
▶	✖	Winter is Coming LLC	Related non-affiliate			(987) 654-3211

Signature Blocks

- The signature block for the EPC merges as:

BORROWERS

Seasons Restaurant, LLC

By: Joe Black Family Trust dated October 31, 2013, its Member/Manager

By: _____
Joe Black, Trustee

- Signature block for the Trust as Guarantor merges as:

GUARANTOR

Seasons Restaurant Equipment, Inc.

By: _____
Joe Black, President/Secretary

Joe Black Family Trust dated October 31, 2013

By: _____
Joe Black, Trustee

Questions?

Email

ventureshelp@cdcloans.com