Ventures+

Companies

Setting Signature Blocks: Entities Owning Entities

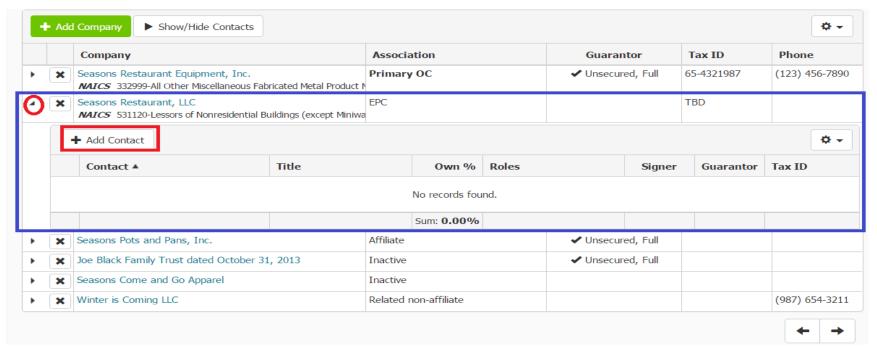
Step 1

- 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

+ Add Company ▶ Show/Hide Contacts										
		Company	Association	Guarantor	Tax ID	Phone				
٠	×	Seasons Restaurant Equipment, Inc. **MAICS** 332999-All Other Miscellaneous Fabricated Metal Product N	Primary OC	✔ Unsecured, Full	65-4321987	(123) 456-7890				
٠	×	Seasons Restaurant, LLC NAICS 531120-Lessors of Nonresidential Buildings (except Miniwa	EPC		TBD					
٠	×	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				

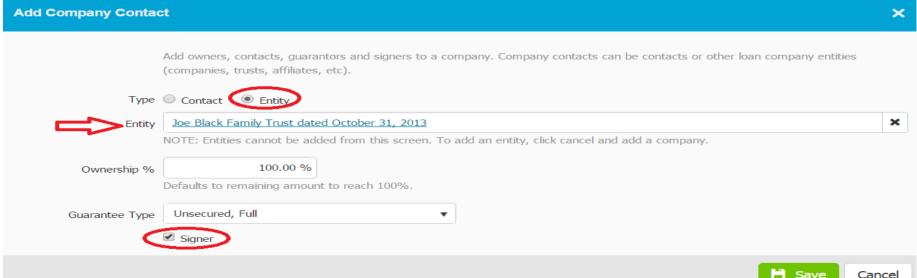
Step 2

- 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

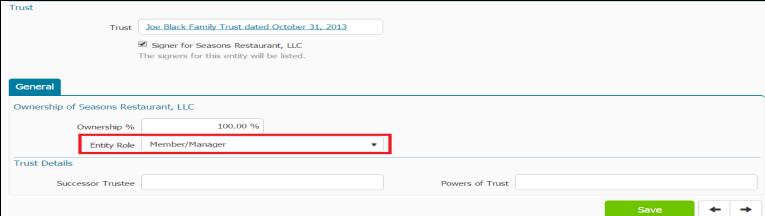
- A pop-up will appear for you to select the type of contact you want to create.
- Click on the radio button for Entity and then select your Entity from the list of available companies in the dropdown.
 - In this scenario the Trust was selected and it owns 100% of the LLC
- If your entity will be signing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



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 Fab	ricated Metal Product N	Primary OC		✔ Unsecured, Full		65-4321987	(123) 456-7890				
4	×	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								
•	×	Seasons Pots and Pans, Inc.		Affiliate	:e ✔ Un		✓ Unsecure	ed, Full					
4	×	Joe Black Family Trust dated October 31	, 2013	Inactive	tive		✓ Unsecure	ed, Full					
	4	+ Add Contact											
		Contact ▲ Title ✓ Joe Black Trustee			Own %	Roles		Signer	Guarantor	Tax ID			
	×				100.00%			*		123-45-6789			
					Sum: 100.00								
•	×	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:



Signature block for the Trust as Guarantor

merges as:



