

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

| <div><div>+ Add Company</div><div>▶ Show/Hide Contacts</div></div> <div>⚙</div> | | | | | |
|---|--|-----------------------|-------------------|------------|----------------|
| | Company | Association | Guarantor | Tax ID | Phone |
| ▶ | <div>✕ Seasons Restaurant Equipment, Inc. <i>NAICS</i> 332999-All Other Miscellaneous Fabricated Metal Product M</div> | Primary OC | ✓ Unsecured, Full | 65-4321987 | (123) 456-7890 |
| ▶ | <div>✕ Seasons Restaurant, LLC <i>NAICS</i> 531120-Lessors of Nonresidential Buildings (except Miniwa</div> | EPC | | TBD | |
| ▶ | <div>✕ Seasons Pots and Pans, Inc.</div> | Affiliate | ✓ Unsecured, Full | | |
| ▶ | <div>✕ Joe Black Family Trust dated October 31, 2013</div> | Inactive | ✓ Unsecured, Full | | |
| ▶ | <div>✕ Seasons Come and Go Apparel</div> | Inactive | | | |
| ▶ | <div>✕ Winter is Coming LLC</div> | 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.

| + Add Company | | ▶ Show/Hide Contacts | | ⚙️ | | | |
|---|--|-----------------------|-------------------|-------------------|----------------|-----------|----------------|
| | Company | Association | Guarantor | Tax ID | Phone | | |
| ▶ | × Seasons Restaurant Equipment, Inc. <i>NAICS</i> 332999-All Other Miscellaneous Fabricated Metal Product M | Primary OC | ✓ Unsecured, Full | 65-4321987 | (123) 456-7890 | | |
| ⦿ | × Seasons Restaurant, LLC <i>NAICS</i> 531120-Lessors of Nonresidential Buildings (except Miniwa | EPC | | TBD | | | |
| <div> <div>+ Add Contact</div> <div>⚙️</div> </div> | | | | | | | |
| | Contact ▲ | Title | Own % | Roles | Signer | Guarantor | Tax ID |
| No records found. | | | | | | | |
| | | | Sum: 0.00% | | | | |
| ▶ | × 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 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 ×

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

Ownership %
Defaults to remaining amount to reach 100%.

Guarantee Type ▼

☒ **Signer**

 Save

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.

| | | | | | | | |
|---|--|-------|--------------|-------|--------|-----------|--------|
| <div><div></div><div>×</div></div> Seasons Restaurant, LLC NAICS 531120-Lessors of Nonresidential Buildings (except Miniwa | | EPC | | TBD | | | |
| <div><div>+ Add Contact</div><div><div></div><div></div></div></div> | | | | | | | |
| | Contact ▲ | Title | Own % | Roles | Signer | Guarantor | Tax ID |
| <div>×</div> | Joe Black Family Trust dated Octobe... | Trust | 100.00% | Trust | ✓ | ✓ | |
| | | | Sum: 100.00% | | | | |

Trust

Trust: [Joe Black Family Trust dated October 31, 2013](#)

☒ Signer for Seasons Restaurant, LLC
The signers for this entity will be listed.

General

Ownership of Seasons Restaurant, LLC


Ownership %

Entity Role

Trust Details

Successor Trustee

Powers of Trust

Save  

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 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|-----------------------|-------------------|------------|-------------------|-----------|----------------|-------|-----------|-------|--------|-----------|--------|-------------------------------------|--|-------------------------------------|-----------|---------|---------|---|---|--|-------------|--|--------------|--|--------------|--|--|---------------------------------------|-----------------------------|---------------------------------------|-----------------------------|----------|-------------------|--|--|---------------------------------------|---|---------------------------------------|----------------------|-----------------------|-------------------|--|--|---|----------------|--|--|--|--|--|--|--|-----------|-------|-------|-------|--------|-----------|--------|-------------------------------------|-----------|---------|---------|--|---|--|-------------|--|--|--|--------------|--|--|--|--|---------------------------------------|-----------------------------|----------|--|--|--|--|--|---------------------------------------|----------------------|-----------------------|--|--|--|--|----------------|
| ▶ <input checked="" type="checkbox"/> | Seasons Restaurant Equipment, Inc. NAICS 332999-All Other Miscellaneous Fabricated Metal Product M | Primary OC | ✓ Unsecured, Full | 65-4321987 | (123) 456-7890 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ▲ <input checked="" type="checkbox"/> | Seasons Restaurant, LLC NAICS 531120-Lessors of Nonresidential Buildings (except Miniwa | EPC | | TBD | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div><div>+ Add Contact</div><div><div>⚙️ ▼</div></div></div> | | | | | | | Contact ▲ | Title | Own % | Roles | Signer | Guarantor | Tax ID | <input checked="" type="checkbox"/> | Joe Black Family Trust dated Octobe... | Member/Manager | 100.00% | Trust | ✓ | ✓ | | | | | Sum: 100.00% | | | | | ▶ <input checked="" type="checkbox"/> | Seasons Pots and Pans, Inc. | Affiliate | | | ✓ Unsecured, Full | | | ▲ <input checked="" type="checkbox"/> | Joe Black Family Trust dated October 31, 2013 | Inactive | | | ✓ Unsecured, Full | | | <div><div>+ Add Contact</div><div><div>⚙️ ▼</div></div></div> | | | | | | | | | Contact ▲ | Title | Own % | Roles | Signer | Guarantor | Tax ID | <input checked="" type="checkbox"/> | Joe Black | Trustee | 100.00% | | ✓ | | 123-45-6789 | | | | Sum: 100.00% | | | | | ▶ <input checked="" type="checkbox"/> | Seasons Come and Go Apparel | Inactive | | | | | | ▶ <input checked="" type="checkbox"/> | Winter is Coming LLC | Related non-affiliate | | | | | (987) 654-3211 |
| | Contact ▲ | Title | Own % | Roles | Signer | Guarantor | Tax ID | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> | Joe Black Family Trust dated Octobe... | Member/Manager | 100.00% | Trust | ✓ | ✓ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Sum: 100.00% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ▶ <input checked="" type="checkbox"/> | Seasons Pots and Pans, Inc. | Affiliate | | | ✓ Unsecured, Full | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ▲ <input checked="" type="checkbox"/> | Joe Black Family Trust dated October 31, 2013 | Inactive | | | ✓ Unsecured, Full | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div><div>+ Add Contact</div><div><div>⚙️ ▼</div></div></div> | | | | | | | | | Contact ▲ | Title | Own % | Roles | Signer | Guarantor | Tax ID | <input checked="" type="checkbox"/> | Joe Black | Trustee | 100.00% | | ✓ | | 123-45-6789 | | | | Sum: 100.00% | | | | | ▶ <input checked="" type="checkbox"/> | Seasons Come and Go Apparel | Inactive | | | | | | ▶ <input checked="" type="checkbox"/> | Winter is Coming LLC | Related non-affiliate | | | | | (987) 654-3211 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Contact ▲ | Title | Own % | Roles | Signer | Guarantor | Tax ID | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> | Joe Black | Trustee | 100.00% | | ✓ | | 123-45-6789 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | Sum: 100.00% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ▶ <input checked="" type="checkbox"/> | Seasons Come and Go Apparel | Inactive | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ▶ <input checked="" type="checkbox"/> | Winter is Coming LLC | Related non-affiliate | | | | | (987) 654-3211 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Signature Blocks

- ▶ The signature block for the EPC merges as:

| |
|--|
| <p>BORROWERS</p> <p>Seasons Restaurant, LLC</p> <p>Joe Black Family Trust dated October By: 31, 2013, its Member/Manager</p> <p>By: _____ Joe Black, Trustee</p> |
|--|

- ▶ Signature block for the Trust as Guarantor merges as:

| |
|--|
| <p>GUARANTOR</p> <p>Seasons Restaurant Equipment, Inc.</p> <p>By: _____ Joe Black, President/Secretary</p> <p>Joe Black Family Trust dated October 31, 2013</p> <p>By: _____ Joe Black, Trustee</p> |
|--|



Questions?

Email

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