



smartbiz

Engaging with
SmartBiz

The Challenge

For financial advisors and professional services firms, offering loans to small business clients typically has two main benefits: boosting client satisfaction; and creating a new revenue stream. Offering small business loans, however, is not a simple prospect. Working with a trusted, experienced bank that can help small business clients quickly connect to the right capital for their businesses is the solution for many of today's financial advisors and professional services firms.

When G-Force Funding, a privately-owned specialty finance firm based in Florida, noticed an uptick in client demand for small business loans, they began examining the best ways to meet it. G-Force engaged with SmartBiz, harnessed the platform's technology and team to streamline the lending process for their clients, and quickly turned small business lending from a nice idea into a profitable business line.



How SmartBiz helps

SmartBiz makes available to its partners a combination of AI-powered lending and human-powered customer service. SmartBiz's AI-based lending services technology efficiently processes accurate loan applications, saving time for partners and their clients. In the case of the Florida firm, SmartBiz helped make the end-to-end lending process seamless, enhancing G-force's relationships with its clients and the opportunity for a brand new revenue stream.

The SmartBiz technology platform "reads" an application, instantly checking whether borrowers pre-qualify for certain types of loans, including SBA 7(a) loans, saving applicants time and allowing them to look at other financing options that may be better suited to their needs. The customer service team takes the offering even further. With SmartBiz, partners can reach an actual person for help.

The interpersonal connection is precisely what drew G-Force to SmartBiz. As the firm began to explore which lending solutions they would offer clients, they encountered a technical issue with the SmartBiz platform. They called SmartBiz and a representative picked up right away to talk the firm through it. That encounter sparked the partnership that ultimately led to a \$420,000 loan for one of G-Force's clients.

The Result

SmartBiz helped the Florida firm secure a six-figure term loan for its client by quickly confirming the client was pre-qualified, and providing the client with a hassle-free application. The client got their answer quickly, and their loan not long after from the SmartBiz network. All it took was a call to SmartBiz to get the ball rolling.

Just give us a call - we're ready to help offer meaningful financing solutions for your small business clients.

About SmartBiz - Business Banking Redefined

Our mission is to empower business owners with access to the right financial services at the right time.

We fuel the growth of our small business customers through thoughtful innovation. Gone are the days of complicated, slow, and outdated banking processes designed for large businesses. We've redefined the banking journey specifically for small businesses by combining cutting-edge technology and personalized customer support. And when it comes to SBA lending, we help eligible businesses get to a 'yes' quickly by making the complex clear and the process seamless and streamlined.

Welcome to a new era of small business banking.

Learn more at smartbizloans.com.

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