

WHAT'S THE DIFFERENCE?



VS

4506 Vendor

Tax Return Transcripts for all required years and all required forms, including all applicable 1120, 1120S, 1065 and 1040 returns

DELIVERABLES



Only borrower requested years and forms are provided which leads to increased rejections

Tax Guard Reports on your borrower's federal tax compliance over the past 10 years or more, including all applicable 1120, 1120S, 1065 and 1040 returns

Not available

Post funding monitoring of tax compliance to proactively address credit risk

Not available

Tax Return Transcripts delivered in as little as 4 hours

SPEED & RELIABILITY



Transcript delivery (or rejection) can take 14 to 30+ days

Tax Return Transcripts reliably delivered within the time frame you request (same day, next day or 10 day)

Tax Return Transcripts delivered unreliably, when the IRS is able to process them

As low as 5% rejection rate with clear notification and steps to remedy

30 to 40% rejection rate with no clear notification or reason

No charge for rejections. Pay once to complete your order even if there is a rejection

Charge for rejections and each subsequent order for the same borrower

Core focus on supporting SBA lenders (7a, CDCs, and Third Party 504s) and understands the specific needs of SBAs

CUSTOMER SUPPORT



*Unclear
[However, all of Tax Guard's SBA customers are happy they switched from their previous vendor because of our deep tax and IRS expertise. In fact, 55 out of the top 200 SBA lenders are using Tax Guard and 20% of all SBA 7a loans contain a Tax Guard Report]

Dedicated and experienced customer success manager is assigned to your account to address all of your tax transcript/data questions