



U.S. Small Business
Administration

Settlement Express Auto-Population

Beginning on Thursday, May 9th, select input fields in the Settlement Express' 1086, Note, and Purchaser Confirmation of Sale sections will be auto-populated with CAFS data once the loan is logged by the Registered Holder (Broker). This auto-population will streamline Broker data entry requirements for each loan sale. The Broker should still review all loan information for accuracy prior to submission to the Fiscal Transfer Agent (FTA). Adjustments made to Settlement Express' entries should also be relayed to the Lender for CAFS update, as applicable.

All required documents to sell the portion of an SBA 7(a) loan must continue to be sent to SettlementExpress@sba.gov:

1. A fully executed SBA Form 1086.
2. A true and certified copy of the Borrower's Note, including true and certified copies of any amendments or modifications. All Notes, modifications, or amendments presented for sale must have the SBA Loan Number on the first page of each document.

The SBA Form 1086 and the true and certified copy legend(s) must be signed electronically in compliance with SOP 50 10 7, Appendix 10.

Questions

For questions or concerns relating to this matter, please contact the FTA Client Service Team at fta@sba.gov or via the toll-free hotline at (877) 470-0722.

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