

SBA lender, Grow America Fund, shaves 5 days off of their application process by relying on Tax Guard to provide verified tax return transcripts in 24 hours or less.

CASE STUDY SUBJECT



CLIENT TYPE

SBA Lender

USE CASE

Tax Transcripts

PRIMARY VALUES

Faster Loan Approvals

## WHY GROW AMERICA FUND NEEDED TAX GUARD

SBA lender, Grow America Fund, was using an outside vendor to provide verified tax return transcripts for small business clients applying to borrow money.

Unfortunately, the vendor's verifications would regularly take a week or longer, sometimes preventing deals from moving forward.

"We would send a request, and it would take close to a week to hear back from them," said Conor McCarthy, Loan Officer at Grow America Fund. "We're always trying to move a deal from start to finish. So any point that you can shave days off of that process, is consequential."

Grow America Fund sought out a solution to help them speed up their deal approval process and partnered with Tax Guard. "With Tax Guard, our turnaround time is a day," said Conor.

**I would definitely recommend Tax Guard because I think the process is efficient and reliable."**

**CONOR MCCARTHY**  
Loan Officer | Grow America Fund

## BENEFITS



Turnaround time for obtaining tax return transcripts reduced from **6 days to 1.**



Conor describes his experience with the Tax Guard team as "Great! They are a really good group of people."