



# Lenders Cooperative & Ventures

## Status Update

Webinar: September 3rd, 2025

# On Today's Webinar



**Tom Brune**

President, Ventures



**Julie Middleton**

VP Sales & Support, Ventures



**Chris McClinton**

President & CRO



**Olivia Wallace**

Client Success Manager  
Team Lead



**LENDERS**  
COOPERATIVE

**Ventures**  
LENDING TECHNOLOGIES  
part of the **LENDERS COOPERATIVE** family.

**One Team. One Unified Platform.**



# What's Happening?

- A single unified platform
- The best of both systems
- A new modern interface and workflow
- A smooth data migration when ready
- Ventures will remain updated and supported

# What this means to you!

- Each lender can decide when to transition based on their priorities and needs
- No conversions required until full LOS functionality and data migration from Ventures is available
- Ventures will remain supported and updated per SBA requirements until LOS is complete



**LENDERS**  
COOPERATIVE

**I'm opening up my schedule to meet and answer any questions.**

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*Julie Middleton*  
*Relationship Manager*





## What can the LOS do now for Ventures users:

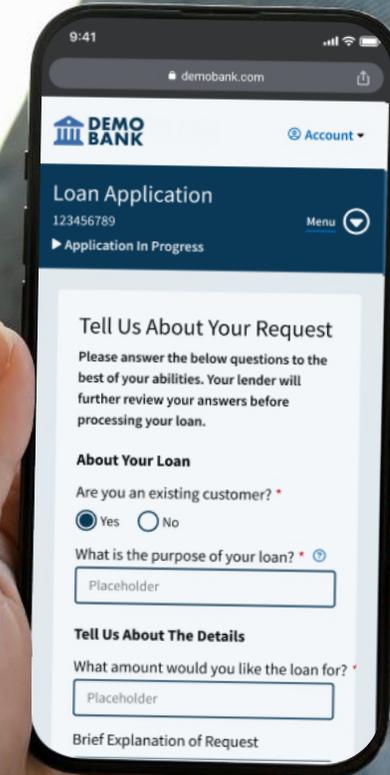
- Underwriting and Closings for:
  - 7a large and small loans including 7a Etran
  - Non-SBA loans
- Borrower Portal
- Electronic Signatures
- Broker Portal (releases soon)

## What is the order of priority for work to be completed:

- Adding 504 underwriting and Etran
- Adding 504 closing documents
- Servicing Functionality

# Thoughtful and Intentional

- Collaboration Groups being used currently:
  - Loan Covenant Tracking / Ticklers
  - Servicing Requests / Modifications
- AI usage

A close-up photograph of a person's hands holding a smartphone. The phone screen displays a mobile web application for "DEMO BANK". The page is titled "Loan Application" and shows a progress indicator "Application In Progress". The form contains several sections: "Tell Us About Your Request" with a paragraph of instructions; "About Your Loan" with a question "Are you an existing customer?" and radio buttons for "Yes" (selected) and "No"; a question "What is the purpose of your loan?" with a text input field containing "Placeholder"; "Tell Us About The Details" with a question "What amount would you like the loan for?" and another text input field containing "Placeholder"; and a final section "Brief Explanation of Request". The background is a blurred image of a person sitting in a chair, looking out a window.

# A Track Record of Success



**2007**

**Summit Technology Group (STG) formation**  
Parent company of Lenders Cooperative



**2019**

**Lenders Cooperative client base reaches 60**

**Ventures**  
LENDING TECHNOLOGIES

**2025**

**Lenders Cooperative acquires Ventures**



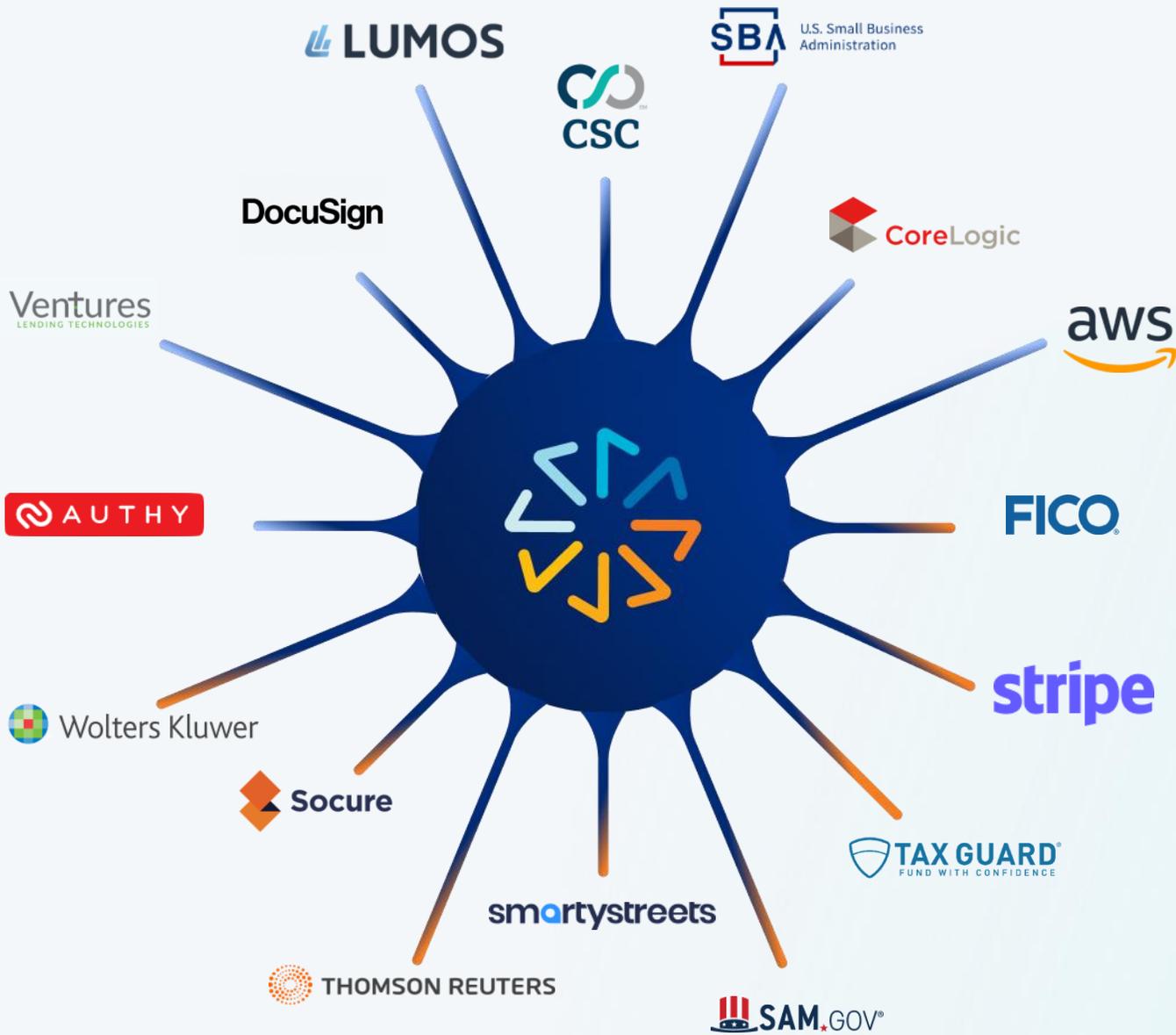
**2018**

**STG raises first capital from ABA**



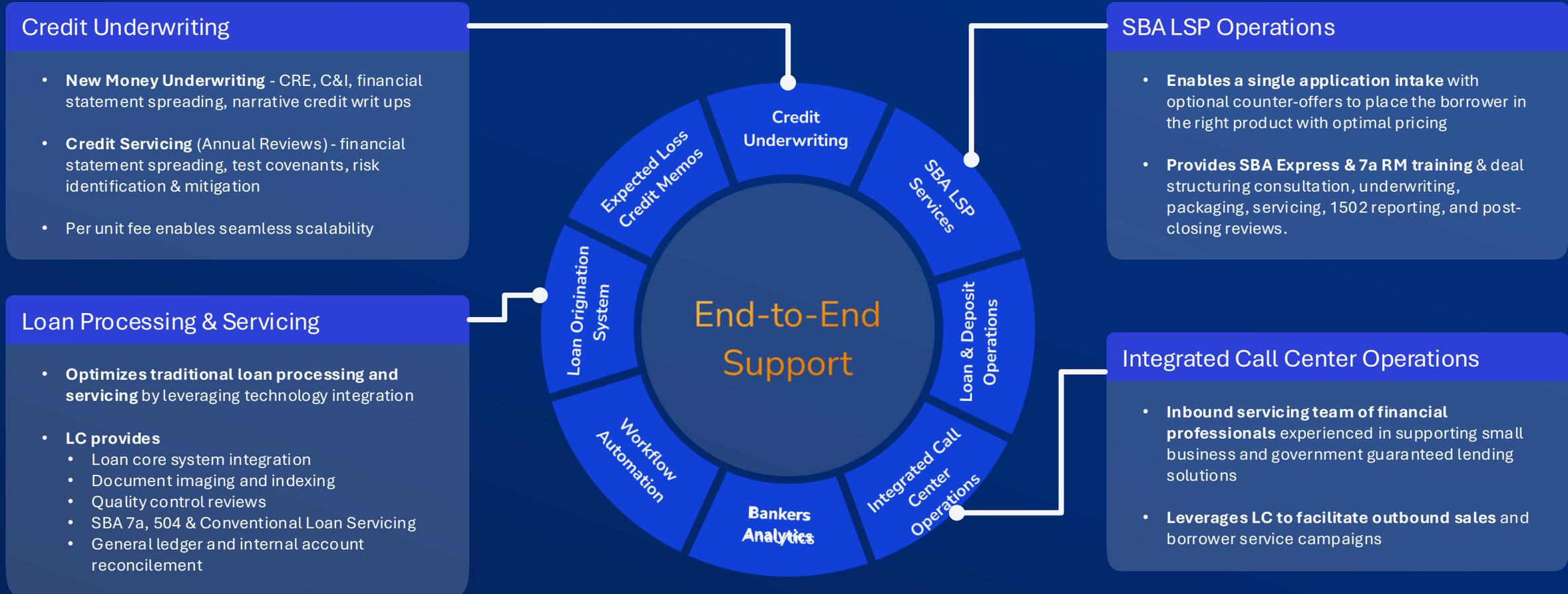
**2020**

**Hired by SBA & Treasury for Technology**



## PARTNERING WITH LEADING SUPPLIERS

# POWER OF LENDERS COOPERATIVE LSP TEAMS





# Let's highlight the LOS with an intro demo from Olivia

# What to Expect Next....



## Marketing/Branding – Shifting Ventures Over to Lenders Cooperative

Starting in October

- **Current Ventures Website** – Redirected to [LendersCooperative.com/Ventures](https://LendersCooperative.com/Ventures)
- **Social Media** – Merge into the Lenders Cooperative social channels
- **Email Communications** – Will be sent from Lenders Cooperative email addresses
- **Newsletter** – Will be sent from Lenders Cooperative email addresses
- **Conferences** – Lenders Cooperative will be the sole brand represented

## Education

We encourage you to check out the educational content that is created by our team of lending experts.

- **Webinars/Podcast** – 30 at Noon, Momentum Podcast
- **Content/Industry News** – Available via Lenders Cooperative Momentum Blog
- **Conferences** – Lenders Cooperative speaks at many national and regional conferences on a variety of topics.

**A Landing Page on the Lenders Cooperative website will be available end of September**



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