BOSTON PRIVATE BANK
& TRUST COMPANY

SCOPE Desktop Guide

10 Post Office Square
Boston, MA 02109
617-912-1900

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CONTENTS

Introduction

SCOPE stands for Sales and Credit Origination Processing Engine. SCOPE is used primarily by Commercial Lending, Credit Analysis, Credit Administration, and Operations to facilitate the processing of loans and to manage loan portfolios.

This manual describes how to perform primary SCOPE functions.

Section 1: General Tasks

Opening and Closing SCOPE

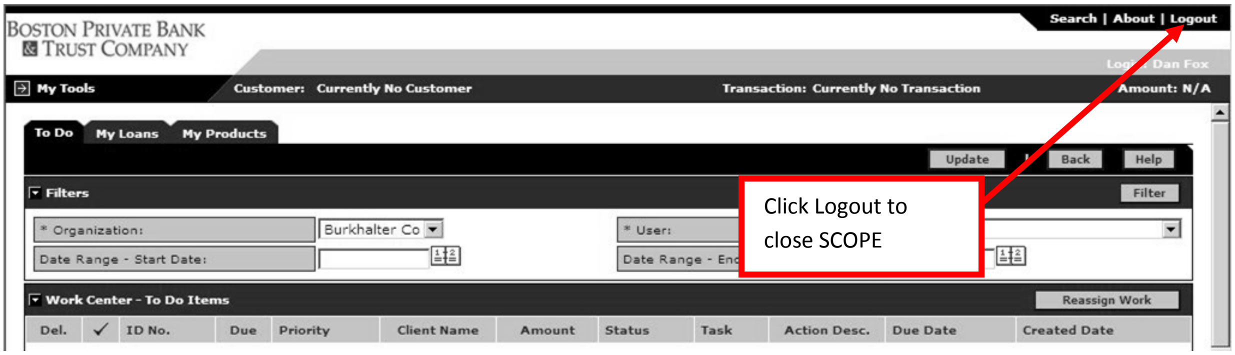
To open SCOPE from your PC:

1. Open your Internet browser.
2. Enter this URL into your browser and click Enter:
   https://bos.capitalstream.com/wbs/template/frames.jsp

   The Login window appears.

3. You have received a user ID and password in an E-mail. Enter them into the User ID: and Password: fields.
4. Click Login to log into SCOPE.

5. The SCOPE Work Center appears.



Click Logout at any time to close SCOPE.

SCOPE Structure

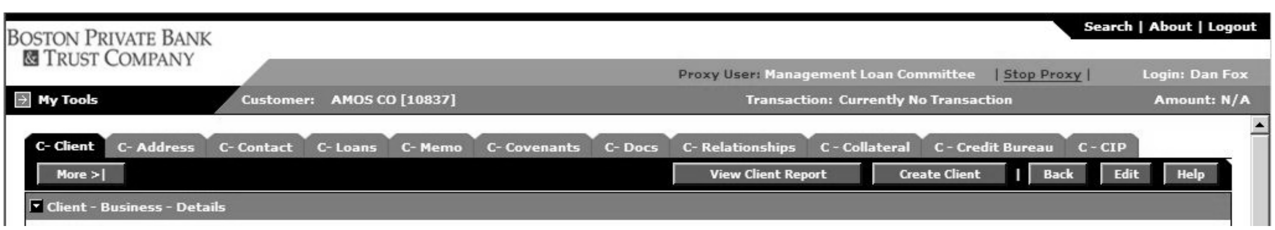
Overall Structure

SCOPE is organized into three levels:

- Client Level
- Finance Request Level
- Transaction Level

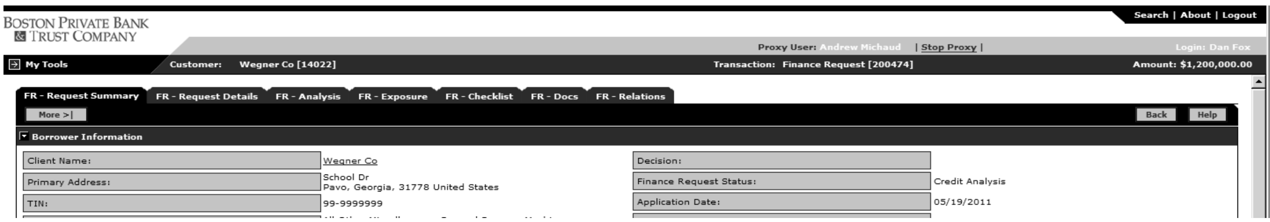
Client Level

The Client, or C-tab level, lets you view and modify client information such as name, address, and loans.



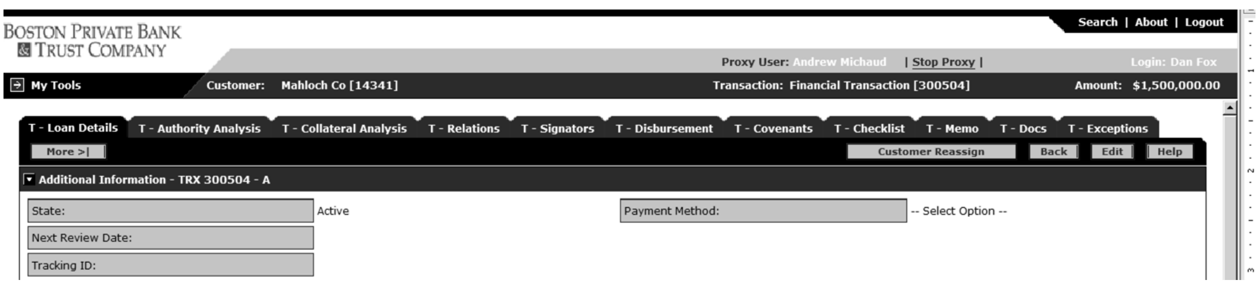
Finance Request Level

The Finance Request, or FR-tab level, lets you view and modify finance requests (requests for new loans and modifications of existing loans).



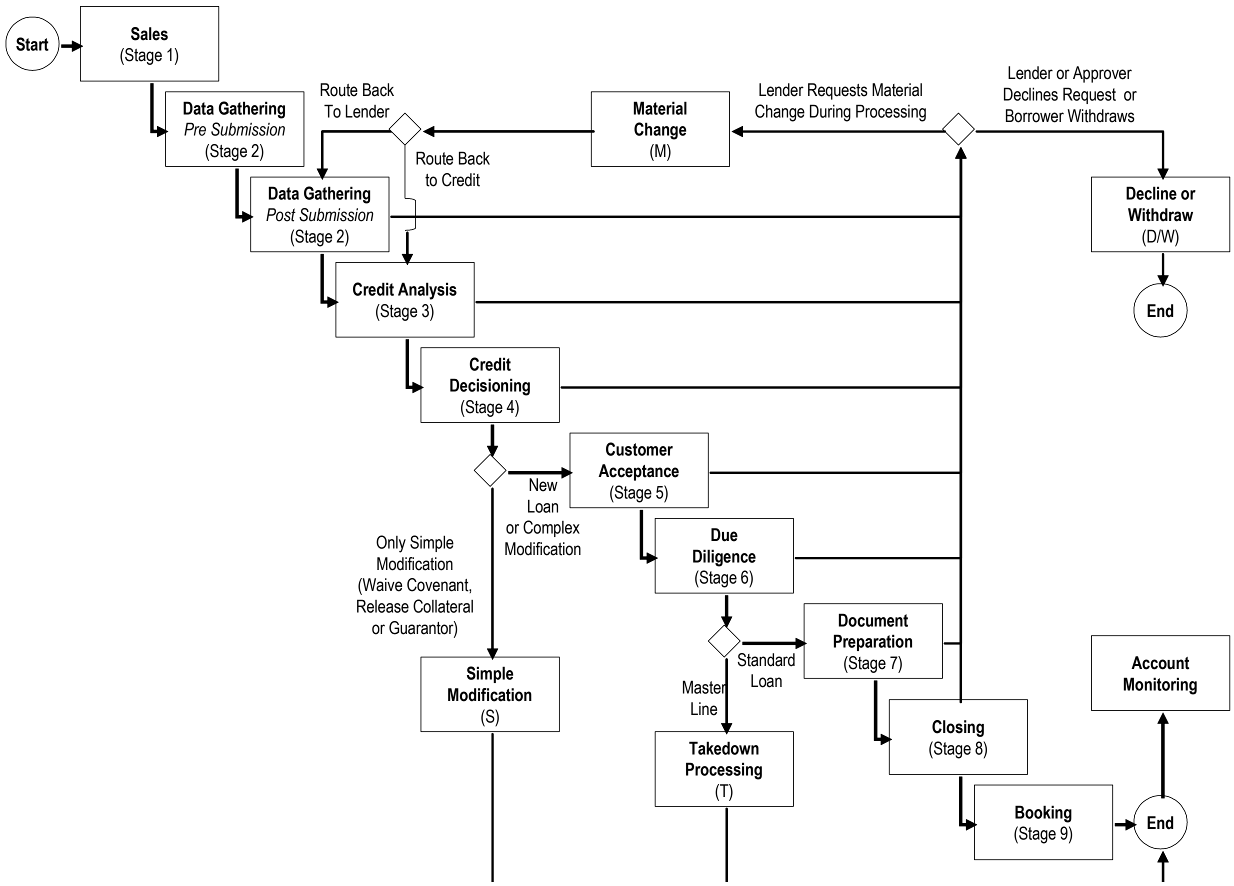
Transaction Level

The Transaction, or T-tab level, lets you view and modify a variety of loan information.



Information Flow

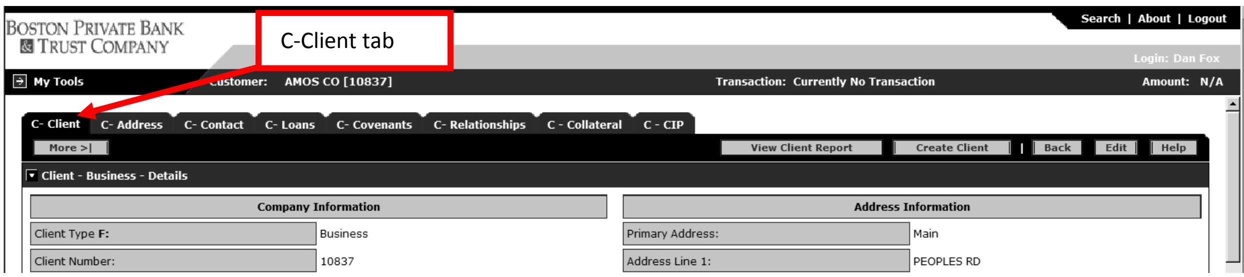
The flowchart illustrates information flow in SCOPE.



Navigating SCOPE

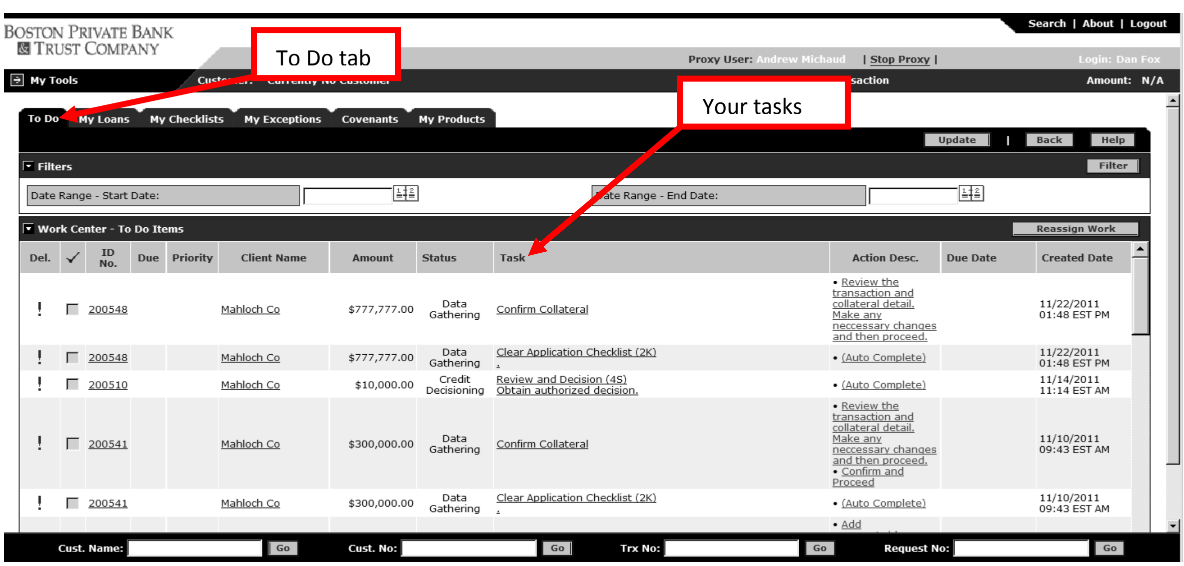
Overview

SCOPE uses a series of tabs to present related lists and actions. To view the window represented by a tab, simply click the tab.



When you open SCOPE, your personal To Do tab appears. It lists your tasks and is the home page for your SCOPE activities. You can navigate to specific items on your list by clicking the appropriate links.

> **Note:** The application number is the task identification number. The numbering scheme is:
>
> - Client numbers begin with 1xxxx
> - Finance request numbers begin with 2xxxx
> - Transaction numbers begin with 3xxxx



The Boston Private Bank & Trust Company logo appears at the upper-left corner of every window. You can click the logo to return to your To Do tab from wherever you are in SCOPE. When you are in doubt as to your location in SCOPE, click the logo to return to your To Do list.

Note: Clicking the logo doesn't work if you have an active process (creating a finance request, for example). In this case you must click the Cancel button to stop the process before you click the logo.

Fields and drop-down lists in which the field name is preceded by an asterisk (*) are required.

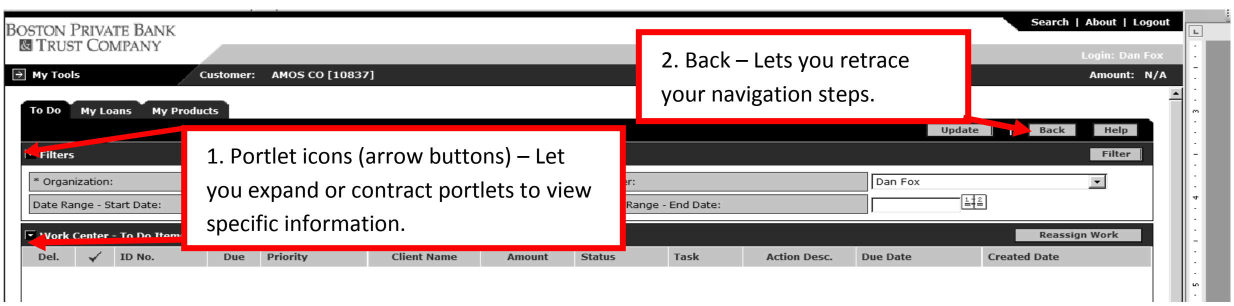
IMPORTANT: DO NOT USE YOUR BROWSER'S BACK BUTTON. Instead, click the Back button or Previous button if either appears in the tab you're viewing.

Navigation Buttons

This section describes SCOPE navigation buttons. The numbers refer to each button's location on the graphics.

1. Portlet Icons (small arrow buttons) – Let you expand or contract portlets to view specific information.

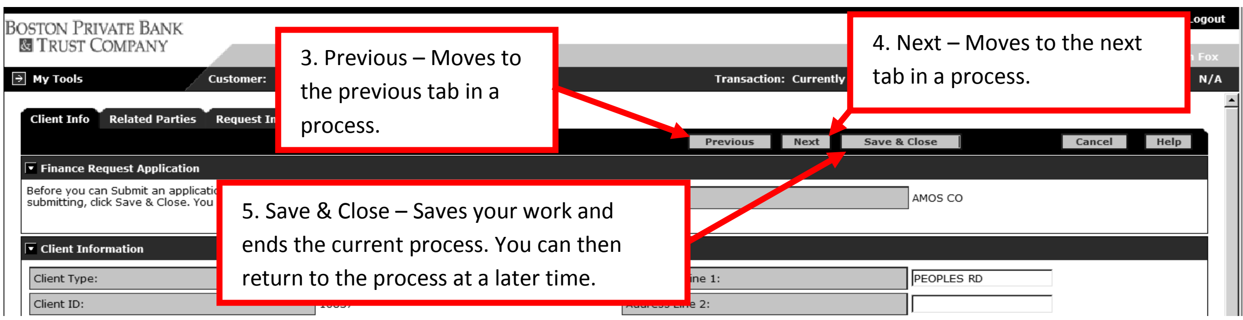
2. Back – Allows you to retrace your navigation steps.



3. Previous – Moves to the previous tab in a process.

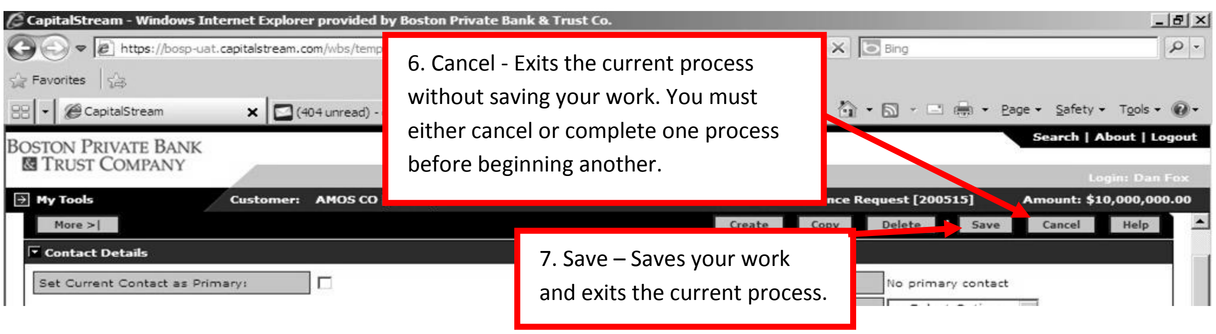
4. Next – Moves to the next tab in a process.

5. Save & Close – Saves your work and ends the current process. You can then return to the process at a later time.



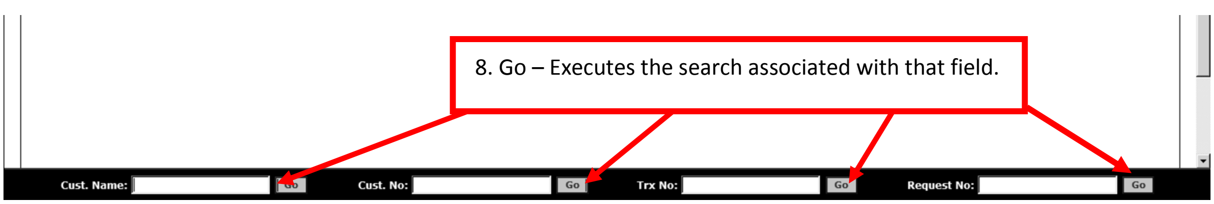
6. Cancel – Exits the current process without saving your work. You must either cancel or complete one process before beginning another.

7. Save – Saves your work and exits the current process.



8. Go – Execute the search associated with that field.

Bottom Search Bar



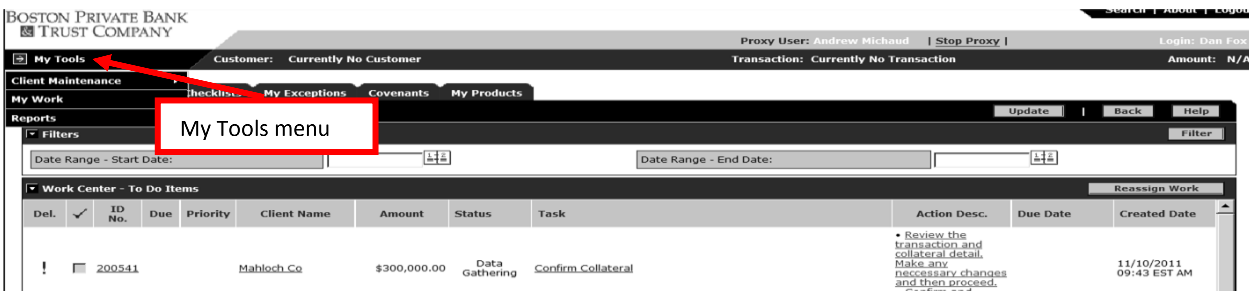
Using Tabs

Tabs are place markers that SCOPE uses to organize groups of functions, such as transactions or client information. You click a tab to view the window that contains the information. For example, clicking the C- tab group provides windows of information about the current client.

Using the My Tools Menu

The My Tools menu appears at the top left portion of all SCOPE windows. When you click My Tools it expands into three task categories:

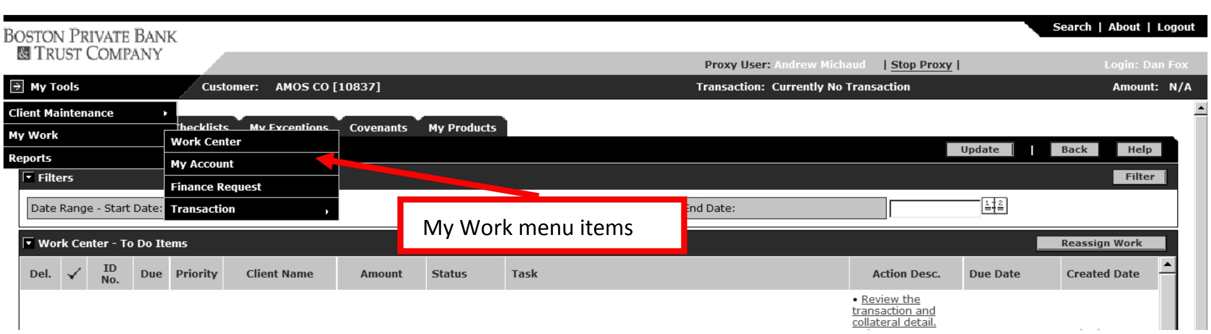
- Client Maintenance (See Viewing and Editing a Client on page 27).
- My Work
- Reports (contact your system administrator)



This section describes the My Tools menu items you will use most often. See your system administrator for information on the remaining menu items.

My Work Menu Items

To view My Work menu items, click My Tools → My Work.

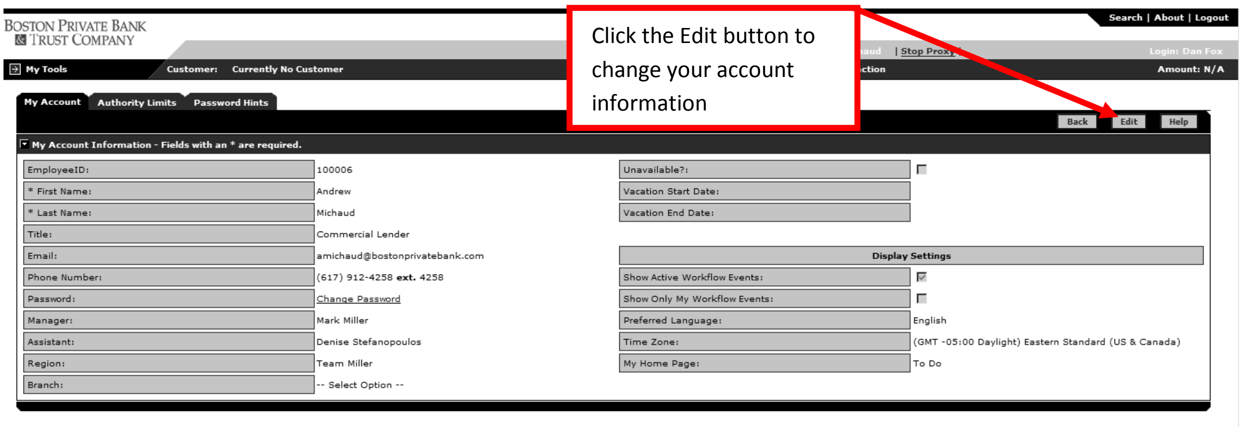


My Work includes four menu items:

- Work Center (contact your system administrator)
- My Account
- Finance Request (contact your system administrator)
- Transaction (contact your system administrator)

My Account

The My Account window lets you view and update your SCOPE account.



To make changes to this information:

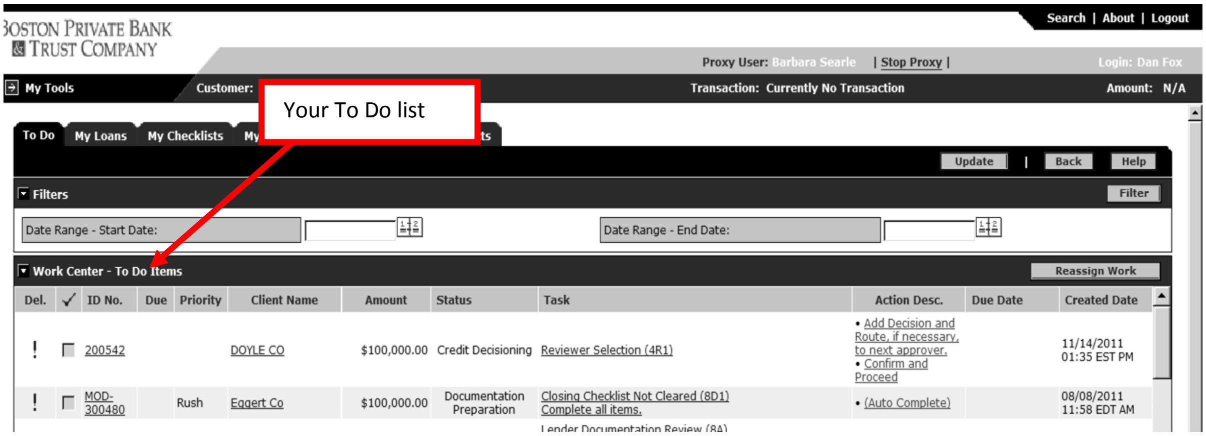
1. Click the Edit button. The fields reappear in edit mode.
2. Make your edits as necessary.

Reports

Contact your system administrator for information.

Using the Work Center

The Work Center is your SCOPE home base. The tabs enable you to view transactions, lists, and tasks, and act on them where needed. Your To Do list tab appears initially by default.



You can return directly to the To Do tab from anywhere in SCOPE by clicking the logo at the top-left corner of any window.

Note: If a process is running you must either complete or cancel it to return to the To Do tab.

The remaining Work Center tabs you see depend on your system and your job duties. Contact your system administrator for information on these tabs.

Managing To Do Items

Topics in the remainder of this manual provide the definition and purpose of each item in your Work Center – To Do Items portlet.

Important: **Click the Update button periodically after you clear items on the Work Center. You may have been assigned new To Do items.**

Using the My Loans Tab

Contact your system administrator for information.

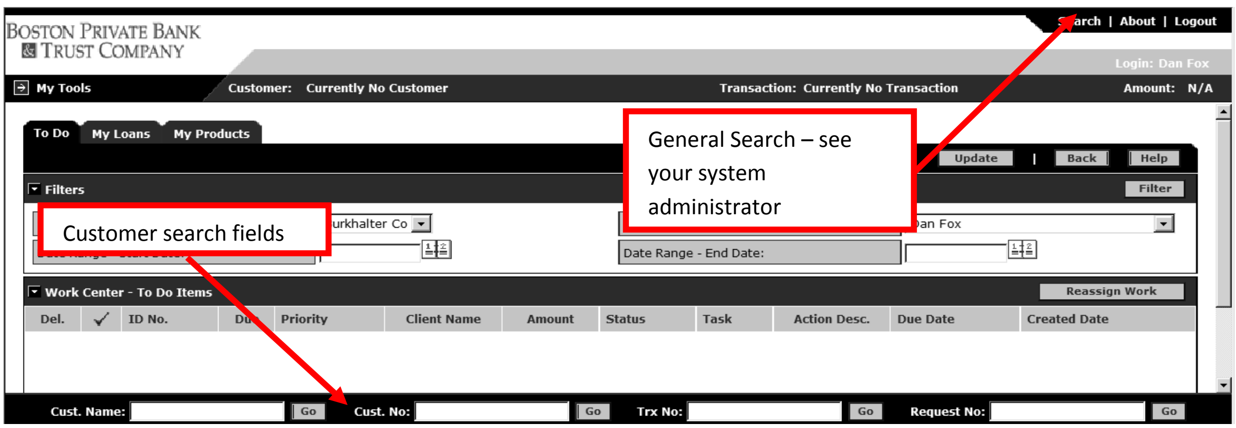
Using the My Products Tab

Contact your system administrator for information.

Performing Searches

There are two ways to perform a search in SCOPE:

- Search using the fields that appear at the bottom of all windows (Also known as the bottom search bar)
- Click on the Search link at the top right of all windows. (Contact your system administrator for information.)



For example, to perform a customer search, enter either:

- The customer name (or part of the name) in the Cust. Name field and click the Go button
- The customer number (or part of the number) in the Cust. No field and click the Go button

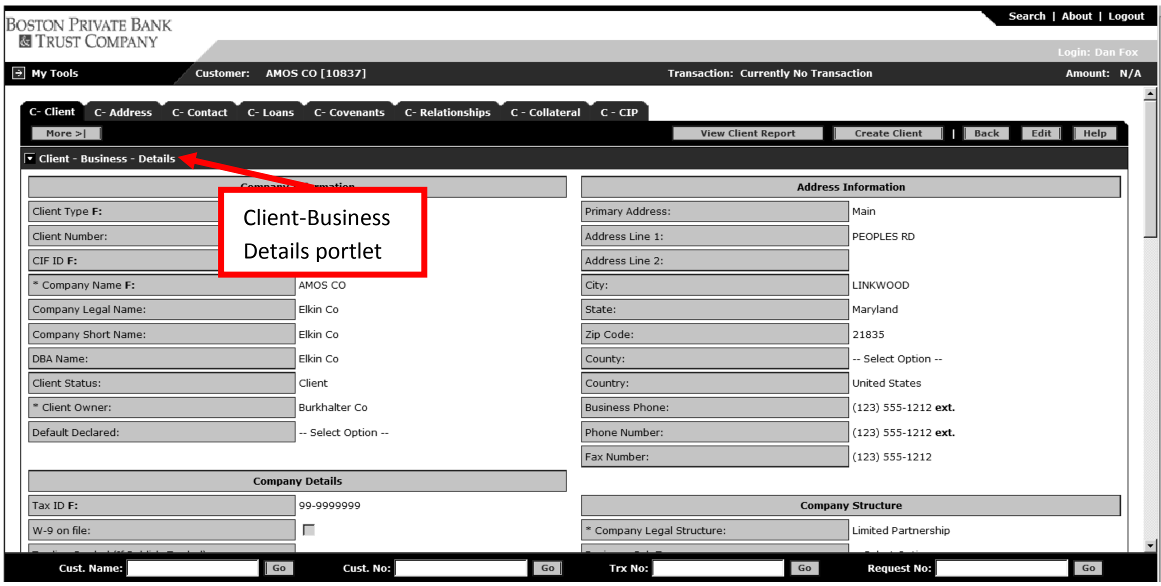
The current client is the client whose name appears at the top of the window, to the right of the Tools tab.

Note: The Cust. Name field only searches for businesses. If you are searching for an individual, click the Go button to bring up the Search window.

If there is more than one result for the Company Name or Client Number you entered, the Search tab and Search Results sub window appear.

Note: For searches, the percentage character (%) is the wild-card character. For example, searching on American% returns all items beginning with American: American Express, American Flyer, and so forth. The less information you enter, the broader the search.

Select the company from the Name column in the Search Results sub window. The C-Client tab appears. The Client-Business-Details portlet contains information for this company.



Note: If you enter the full name or number for a client into the search fields, SCOPE immediately displays the C-Client tab.

Searches using the Trx. No. and Request No. fields function in a similar manner.

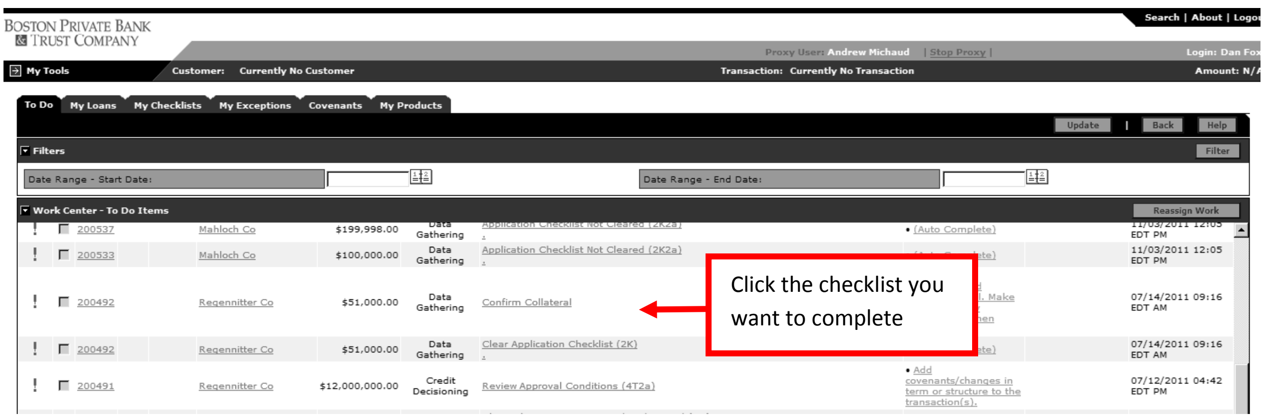
Completing a Checklist

You must complete a checklist if it contains pending items, such as missing information. Checklists only complete if all items for each active checklist are cleared. Therefore, if multiple roles have been assigned checklists, the checklist To Do only clears after all roles have cleared their checklists.

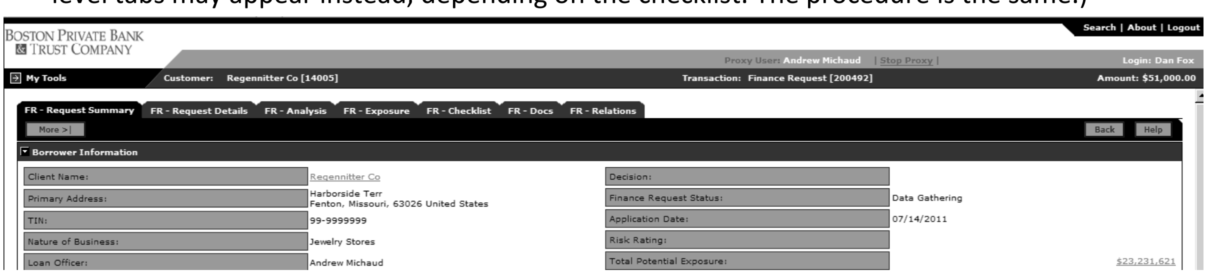
Note: SCOPE generates checklists on the FR- and T-Levels only.

To complete a checklist:

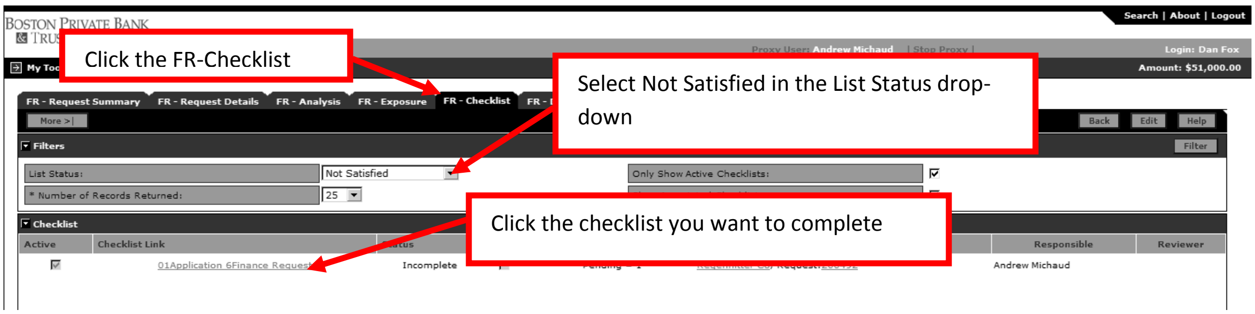
1. Navigate to the Work Center.
2. Select the Work Center To Do tab. Incomplete checklists appear in the list of To Do items.



3. Click the Task link that represents the incomplete checklist. The FR - level tabs appear. (The T-level tabs may appear instead, depending on the checklist. The procedure is the same.)

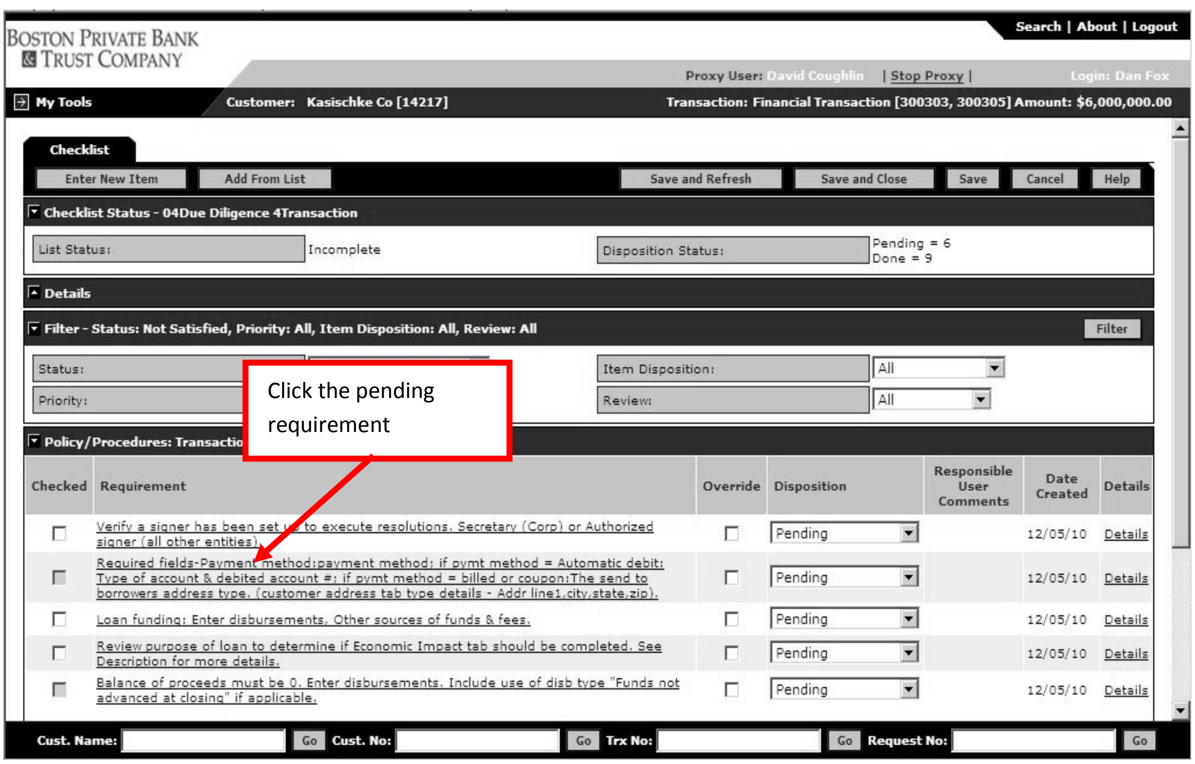


4. Click the FR – Checklist tab.

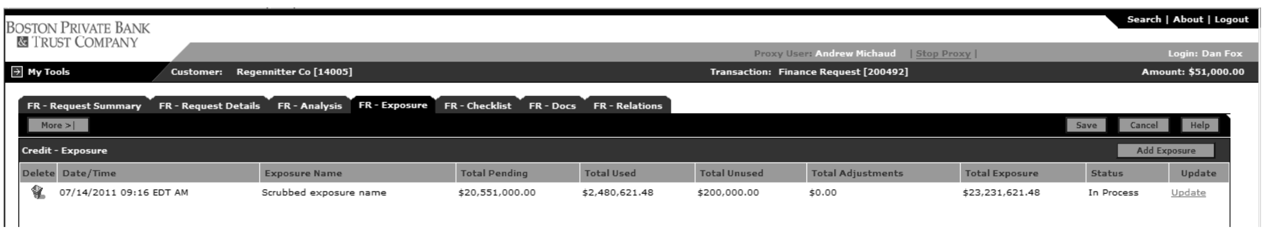


5. Select Not Satisfied in the List Status drop-down.
6. Click the Checklist Link for the checklist you want to complete. Note that all checklists are assigned to the Loan Officer unless otherwise noted at the end of the checklist link. The responsible user is listed under the Responsible column.

The Checklist window appears. A list of pending (incomplete) requirements appears in each portlet.



7. Click the link for the first pending Requirement. The Requirement links you to the screen (or level) on which the information is missing or needs validation.
8. Click the Edit button to edit the fields. In this example, you can delete the exposure, add new exposures or update one or more exposures.



9. Click Save.
10. Click Back.
11. Click Save and Refresh.
12. Now you can either click another pending item or click Save and Close to exit the Checklist tab.

Creating a Memo

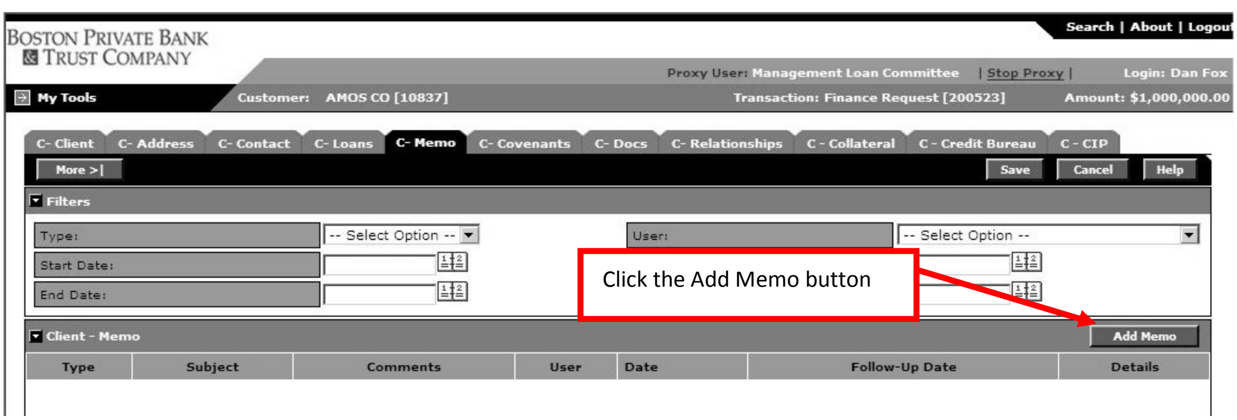
IMPORTANT: All credit comments *must* be entered into SCOPE using this feature. Failure to do so will be an audit finding.

To create a memo:

1. Click the C-Memo tab. The C-Memo window appears.

2. Click the Edit button.

3. Click the Add Memo button and add the text of a credit comment or memo.



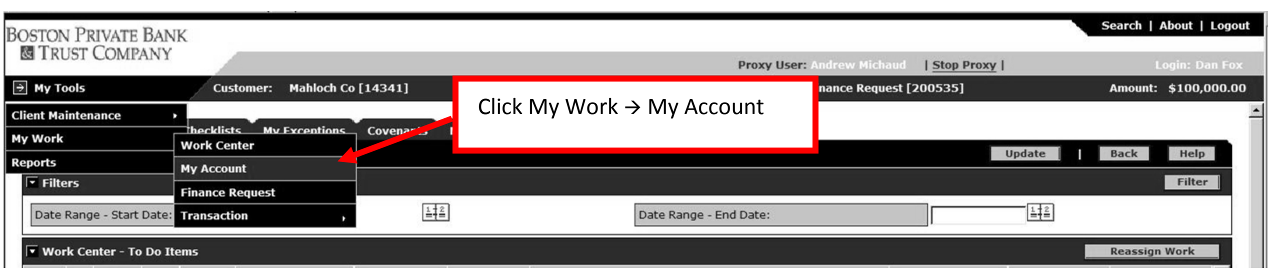
4. Click the Close button, then click the Save button. The memo now appears in your list of memos.

Scheduling a Vacation

When you schedule a vacation, the person you've designated as your backup automatically receives your tasks.

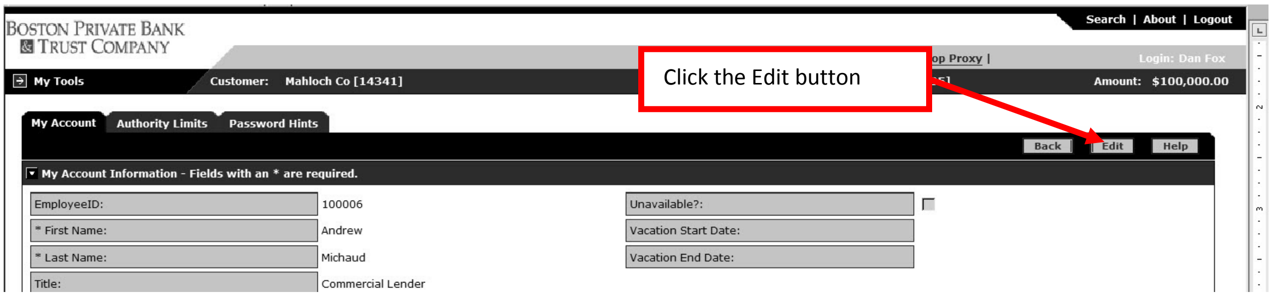
To schedule a vacation:

1. From My Tools, click My Work menu → My Account menu.



The My Account window appears.

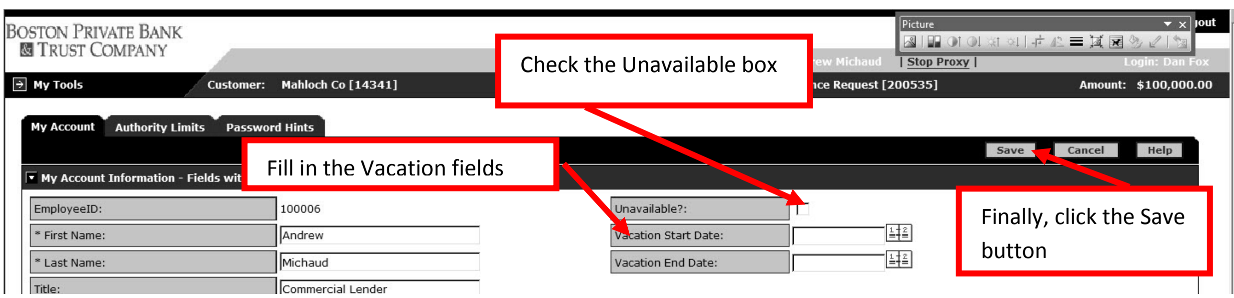
2. Click the Edit button. The Vacation Start Date and Vacation End Date fields appear.



3. Fill in the Vacation fields, either manually or using the calendar icons.

4. Check the Unavailable box.

5. Click the Save button to save the dates you will be unavailable.



6. When you return to work, navigate to the My Account window and clear the unavailable dates.

IMPORTANT: If you don't clear your unavailable dates your backup person will continue to receive your tasks.

Managing Documents

Uploading a Document

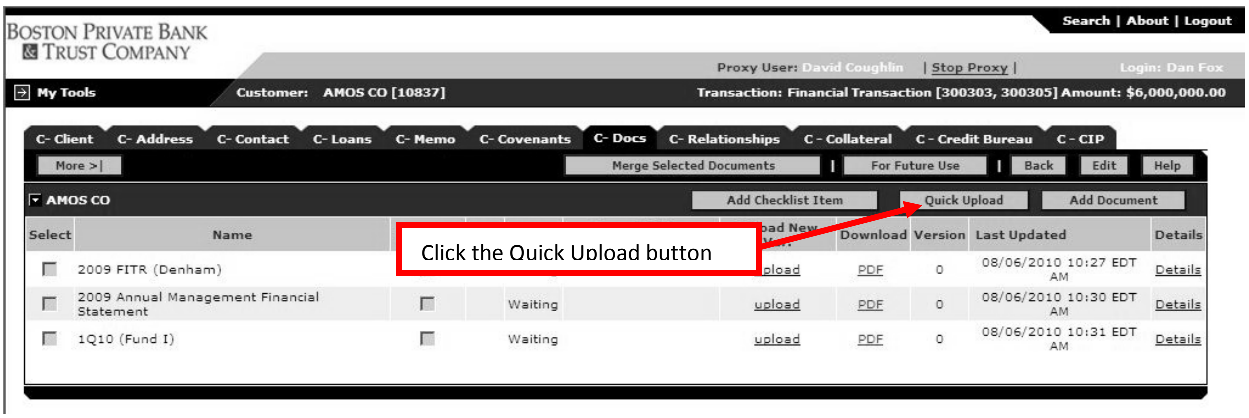
To upload documents for new loans or renewals you can use:

- The C-Docs tab
- The FR-Docs tab
- The T-Docs tab

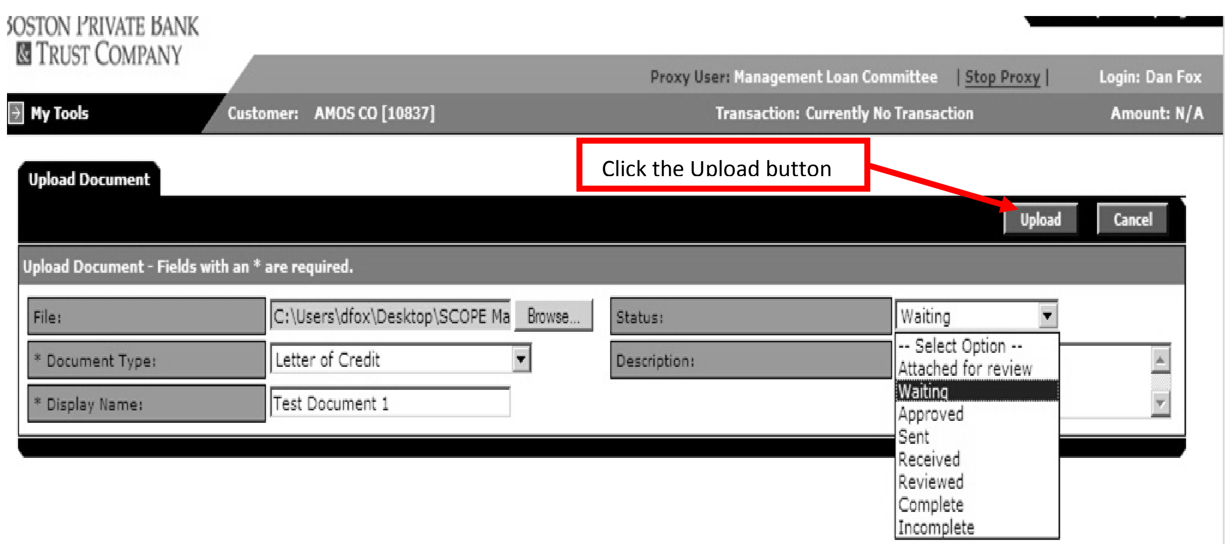
<u>Warning:</u> Do not upload documents to the portlet of a level different from the one you are currently on. For example, do not upload a document to the Financial Transaction portlet while you are on the FR-Docs screen. This will cause an error.

The procedure is the same for all three tabs. For example:

1. Click the C-Docs tab. The document list for the current company appears.

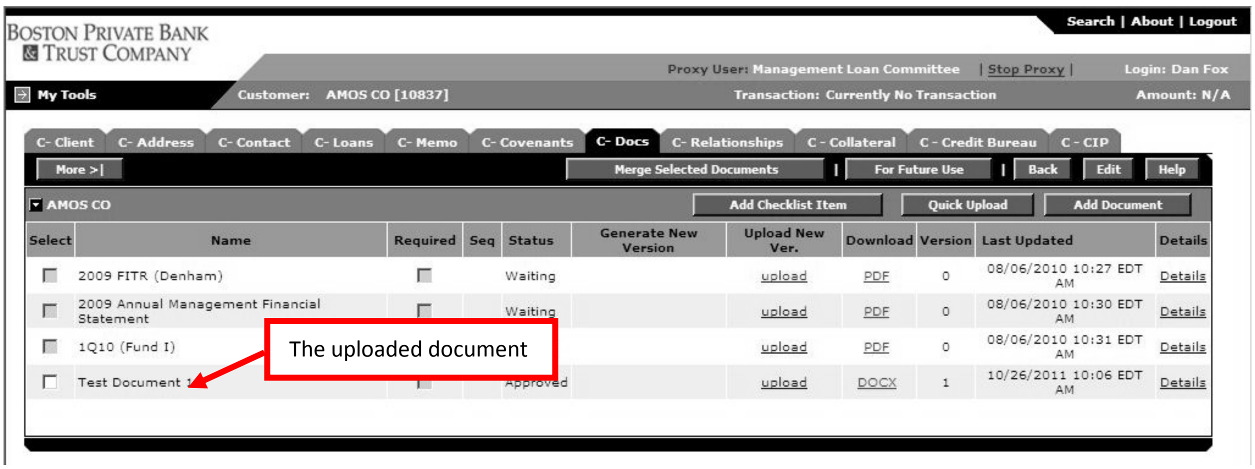


2. Click the Quick Upload button to upload a PDF document or the upload link to update or replace an existing document. The Upload Document window appears.
3. Fill in the fields. See [Appendix B: Naming Conventions on page 83.]
4. Click the Upload button. An upload message appears.



5. Click the Close button. The C-Docs window appears.

The document you uploaded now appears on the document list.

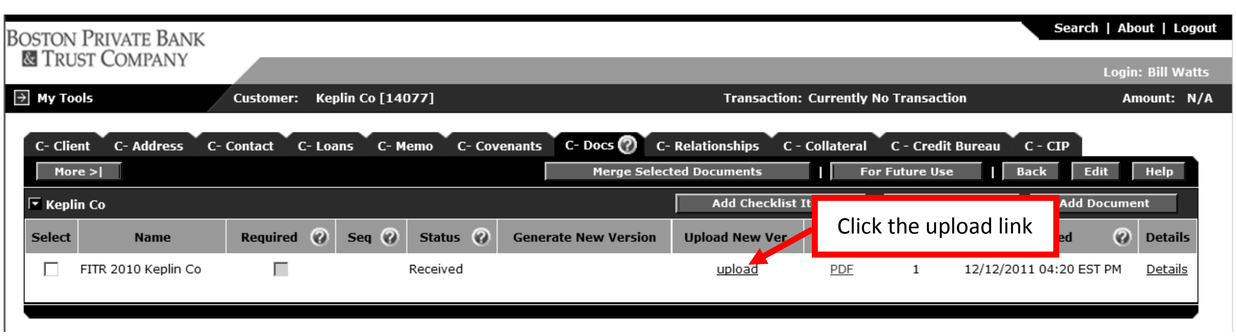


Uploading a New Version of a Document

To upload a new version of a document:

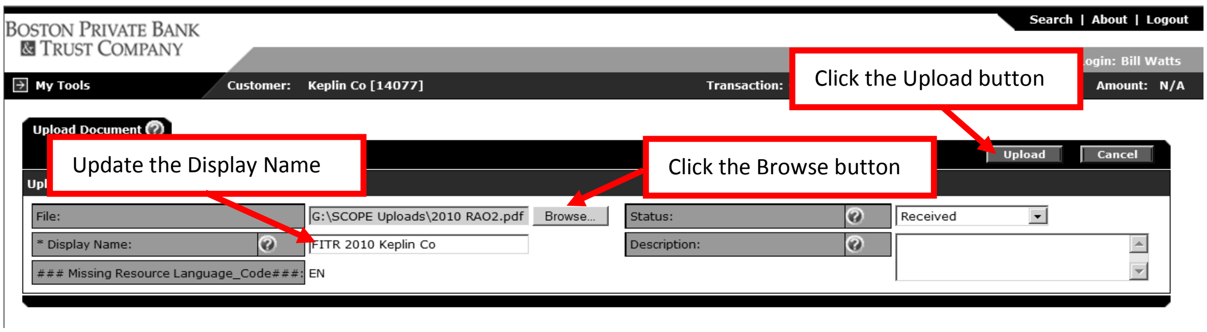
1. From the C-Docs tab, determine which document you want to upload from the list. Note the document version.

2. Click the upload link.



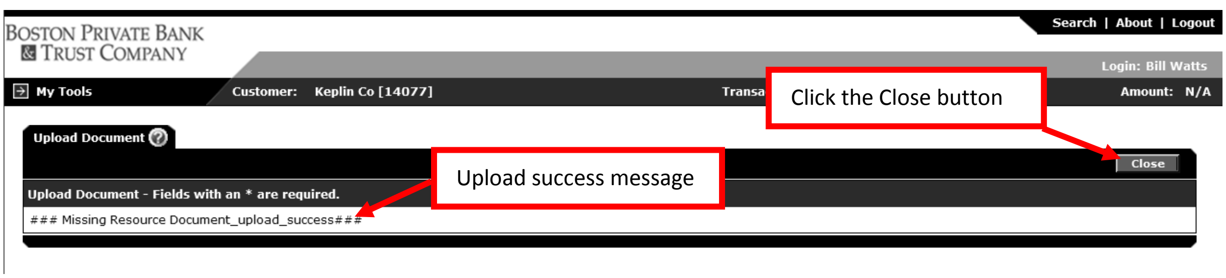
The Upload Document tab appears.

3. Click the Browse button to search for the new document.
4. Update the Display Name with the new version date.
5. Click the Upload button to upload the new version.

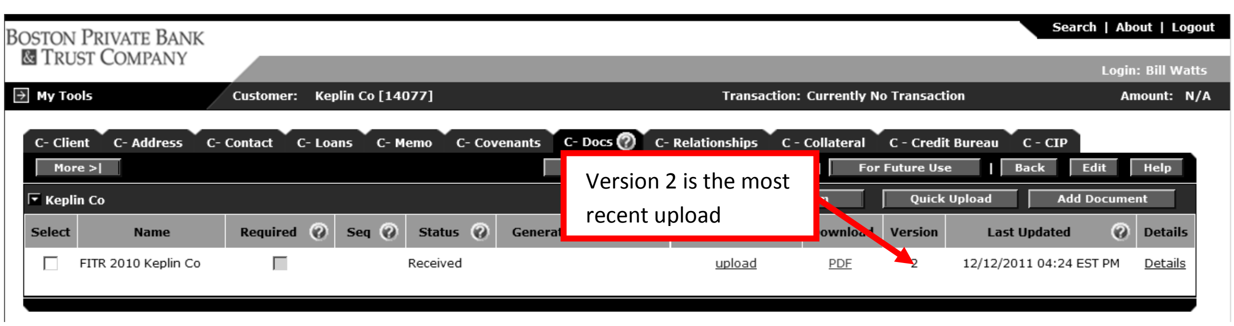


An upload-success message appears.

6. Click the Close button.



The C-Docs list appears. Note that the document version is now Version 2. The document has successfully been updated.



- To view the document, click the DOC hyperlink
- To view the history of other versions, click the Details hyperlink
- To view the history of the document, click the History hyperlink

Section 2: Client Management

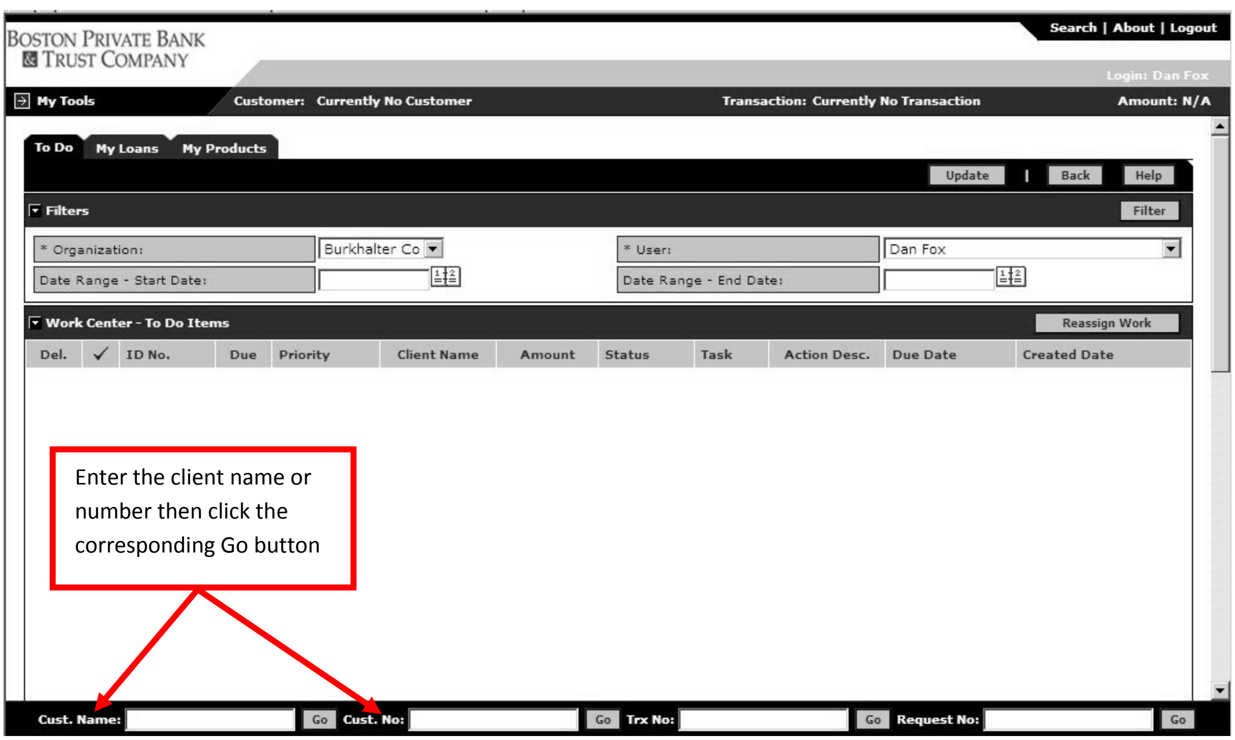
Viewing and Editing a Client

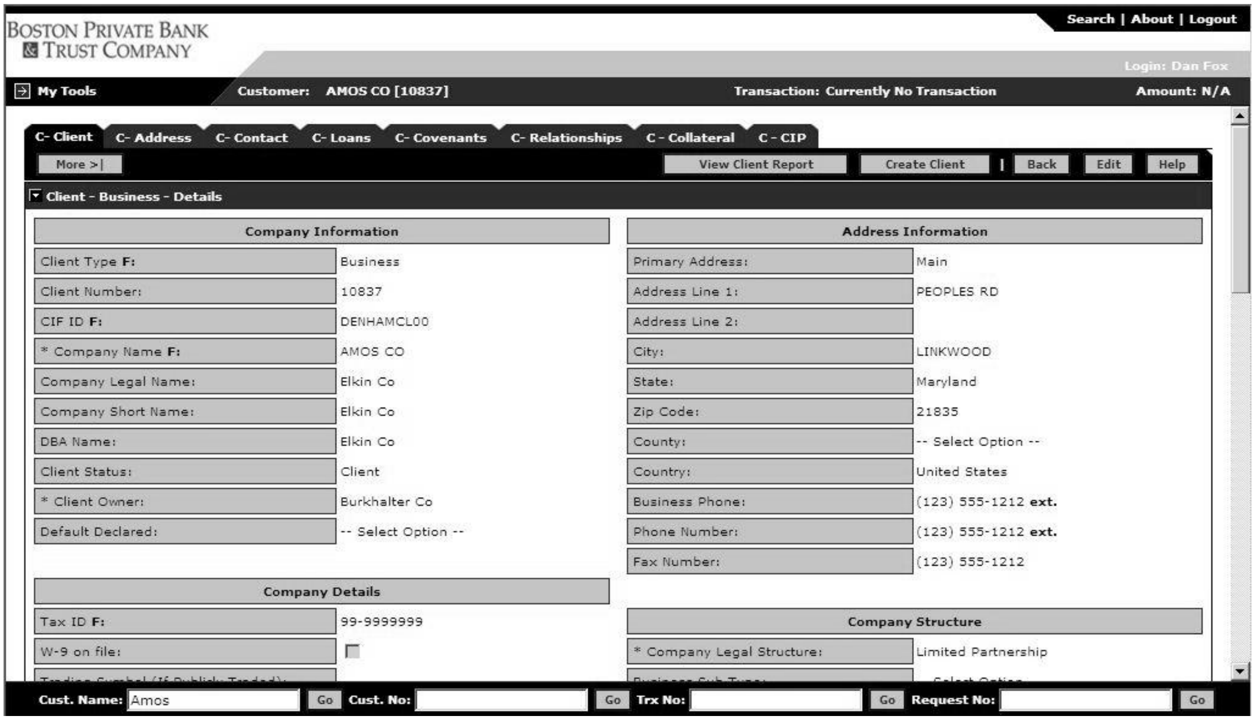
Viewing Information for an Existing Client

1. Navigate to the Work Center. You can get to this window from anywhere in SCOPE by clicking the Boston Private Bank and Trust logo at the top left of the application.
2. Identify the client you want to view by entering appropriate information in either the Cust. Name or Cust. No field at the bottom of the window (See Navigation Buttons on page 11).

   Note: If you enter information that is common to more than one client (entering the letter 'a', for example), on the Search window you will see a list of all clients that contain that information. Simply select the correct client from the list.

3. Click the Go button beside the field you filled in. The Client – Details window appears.
   Note: If the client name appears at the top of your window you can simply click the client name.





Editing Client Information

1. View the client.
2. Click the Edit button at the top right of the window.

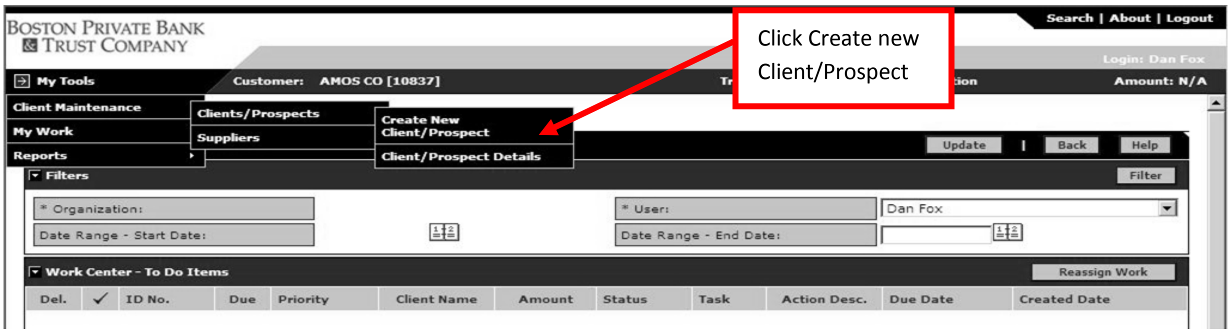
3. An editable version of the Client -- Details window appears. Edit the fields as needed.

4. Click Save to save your changes or Cancel to cancel changes and return to the previous window.

Creating a New Client

To create a new client:

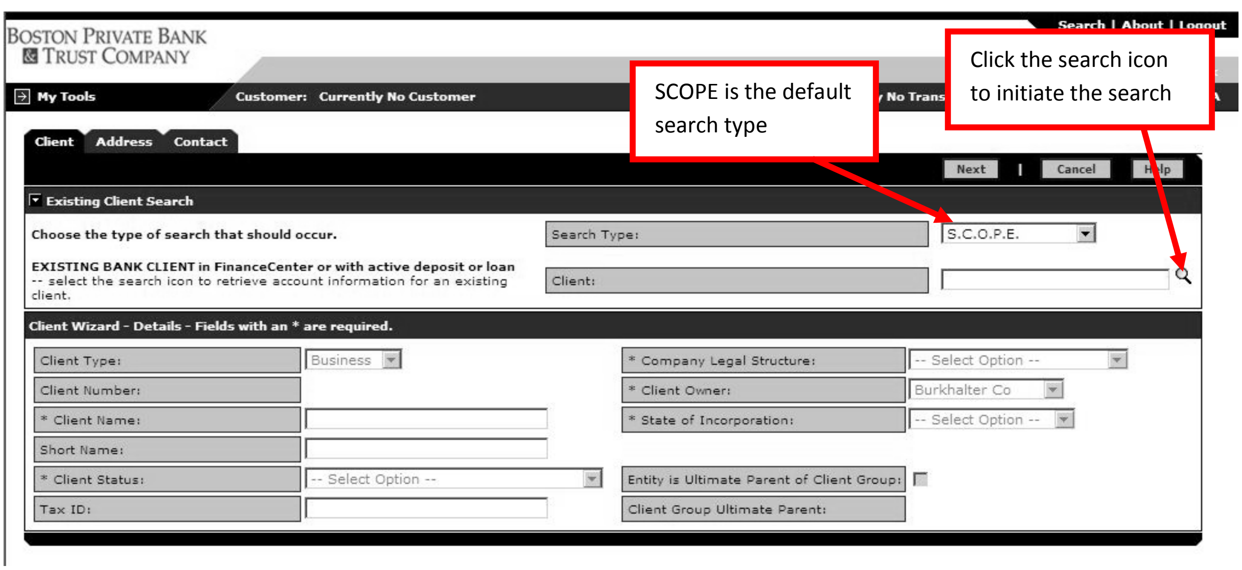
1. From the top window, click My Tools → Maintenance → Clients/Prospects → Create New Client/Prospect.



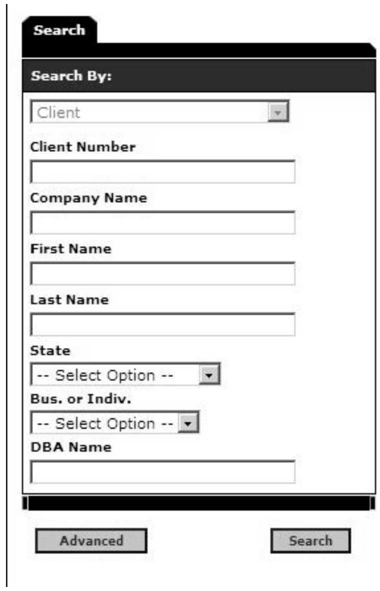
The Existing Client Search window appears.

IMPORTANT: To create a new client, you must first determine that the client does not already exist in either SCOPE or FISERV. To do this, you perform separate searches for both SCOPE and FISERV clients. This section describes this search.

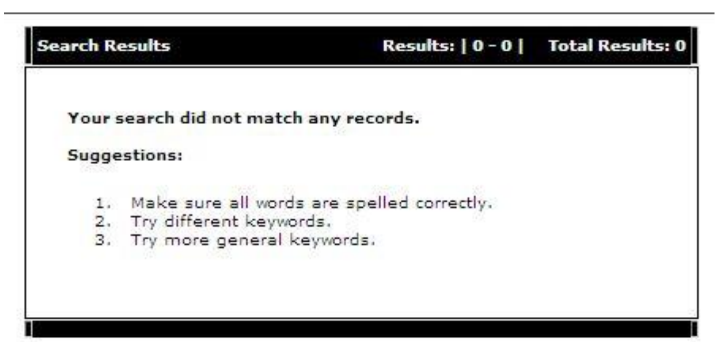
2. Click the search icon to the right of the Client: field to initiate the search in SCOPE.



3. In your browser, a Search Results tab appears. Click this tab. The Search sub-window appears.

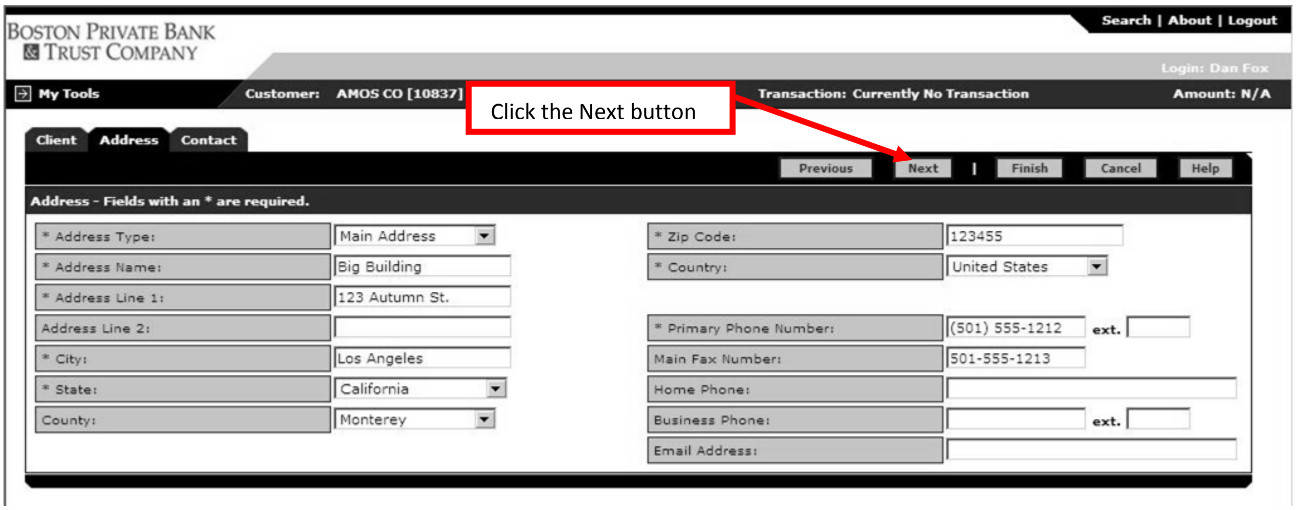


4. Enter information about the new client into one or more fields. The search should be as broad as practicable. Use the % and the minimum information necessary to prevent duplication of clients. For example, %Stew% for The Sean Stewart Trust
5. Click Search. If the client does not exist in SCOPE, the Search Results sub-window appears.



6. If the client exists it will appear on the Search screen list to the right. Select the client from the list and initiate the Finance Request from C-Loans.
7. Return to the Existing Client Search window.
8. In the Search Type: drop-down list, select FISERV.
9. Repeat steps 2 through 7 to search for a FISERV client.
10. Return to the Existing Client Search window. Now you can fill in the Details fields for your new client.
10. When you have filled in the fields, click the Next button. The Address tab appears.
11. Fill in the appropriate fields.

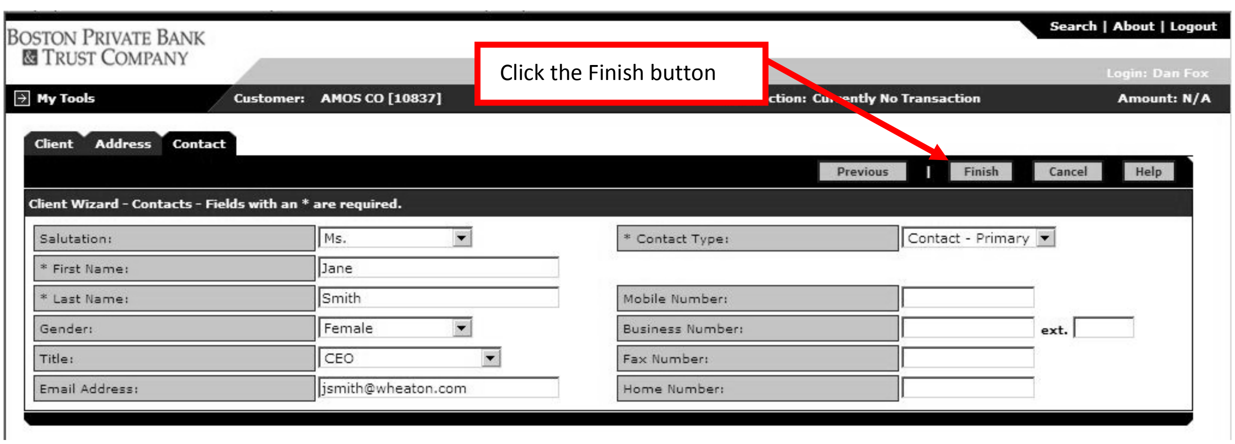
12. Click the Next button. The Contact tab appears.



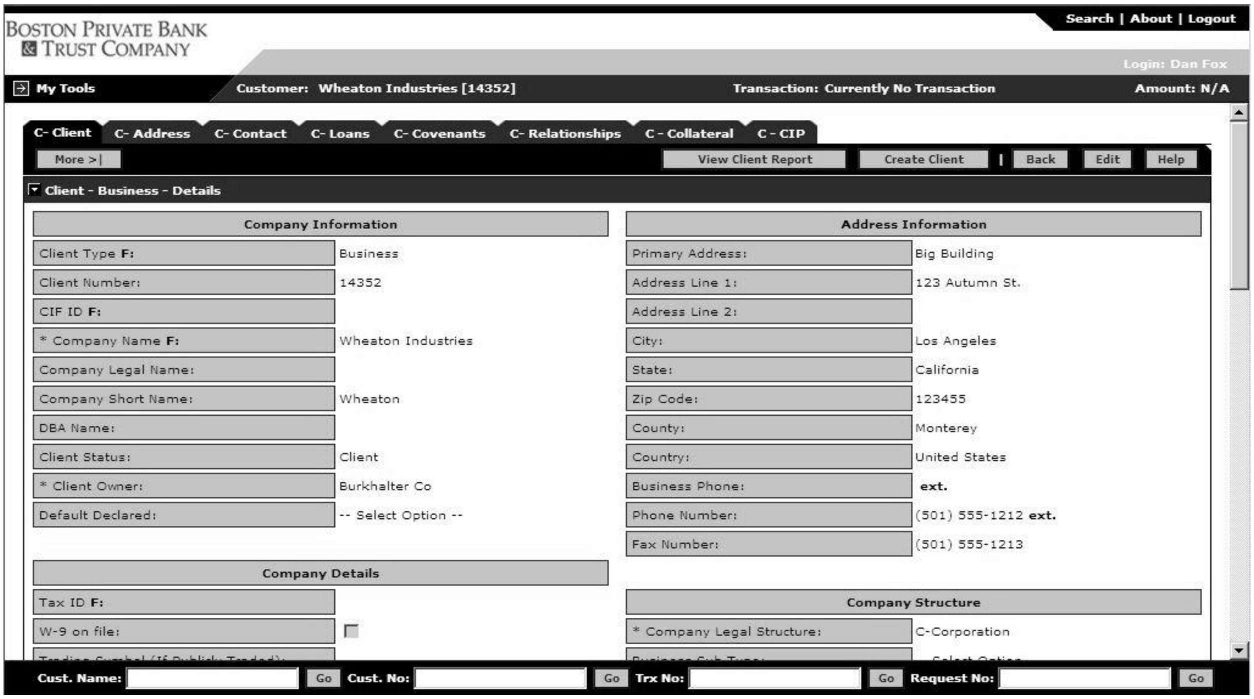
13. Fill in the appropriate fields.

Note: Ensure that the Contact Type is set to Contact-Primary as above.

14. Click the Finish button.



The Client summary window appears.



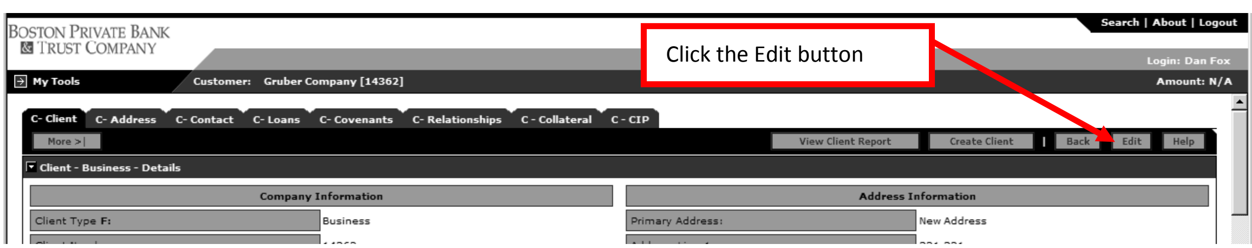
Note: You can click Edit to modify any of the fields. You cannot delete a client.

Assigning an Officer to a New Client or Prospect

To assign an officer to a new client or prospect:

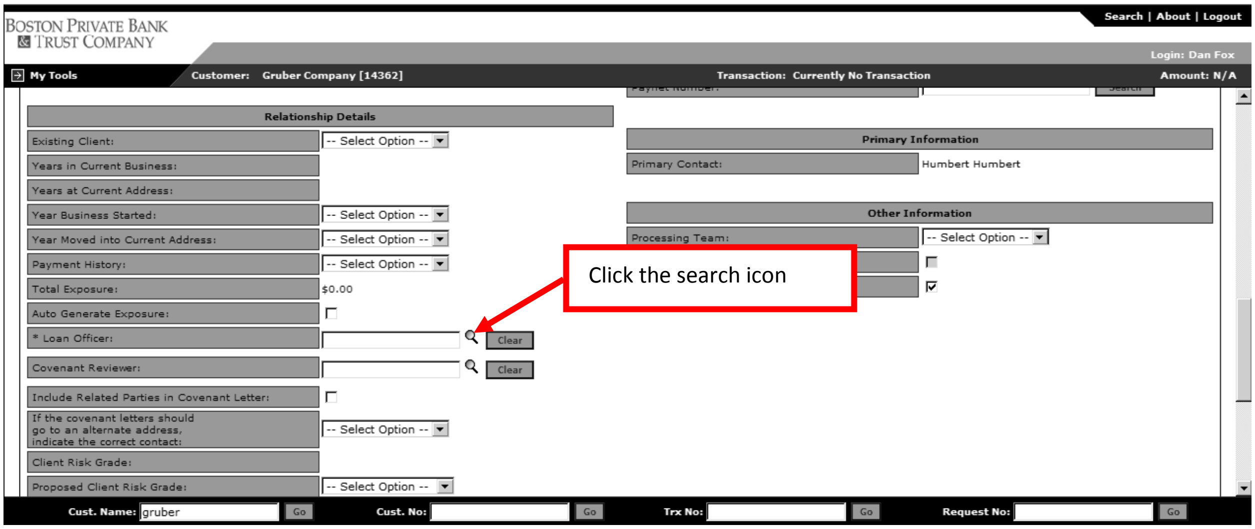
1. Navigate to the C- tabs view for the client.

2. Click the Edit button on the C –Client tab.



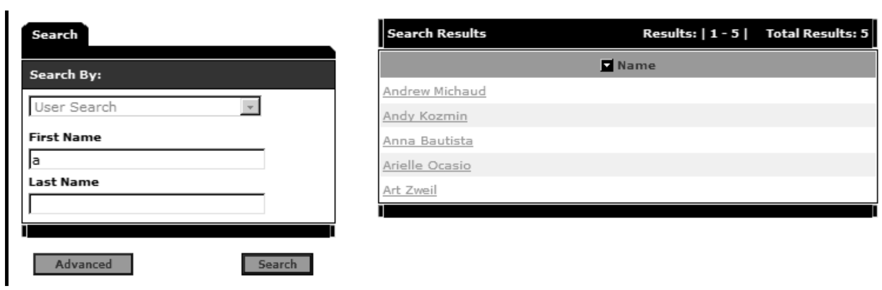
3. Scroll to the Relationship Details portion of the window.

4. Click the search icon to search for the loan officer.



The search tab appears.

5. Search for the loan officer.



6. Click the officer hyperlink in the Search Results sub window. This selects the officer.

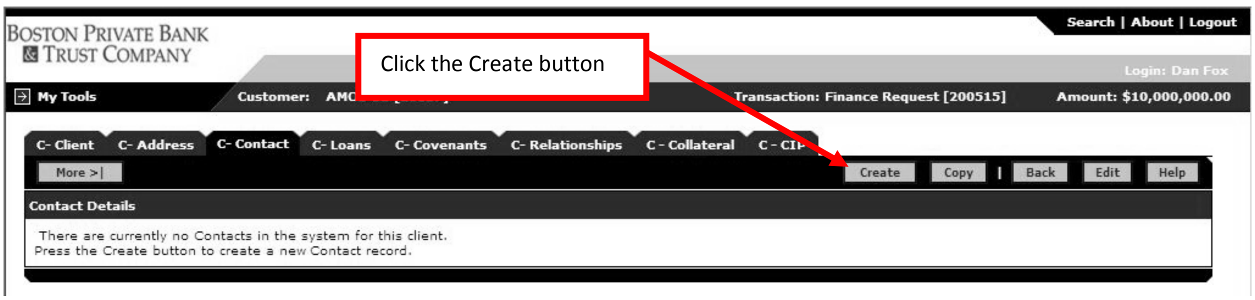
7. Click the Save button.

Creating, Editing, or Deleting a Contact

A contact is a point of contact with the client or a signer for the client.

Note: At least one contact must be of the contact type Contact-Primary.

1. Navigate to the C- tabs for the client for whom you want to create, edit, or delete a contact.
2. Click the C-Contact tab.
3. Click the Create button.

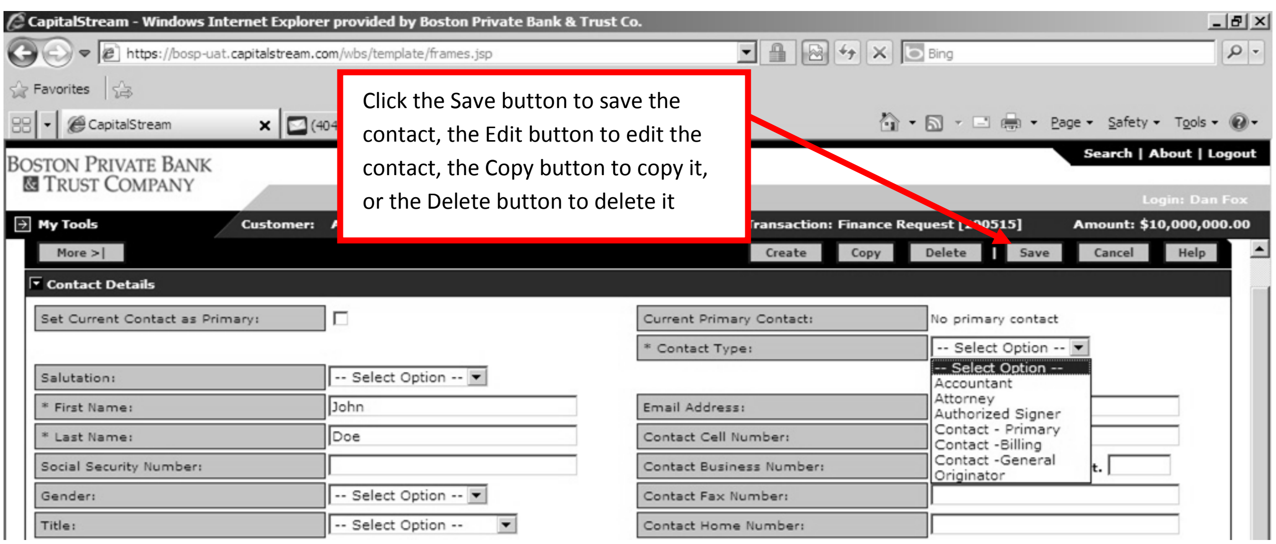


4. Fill in the fields.

5. Click Save to save the contact.

6. To edit the contact, click the Edit button, make your changes, then click the Save button.

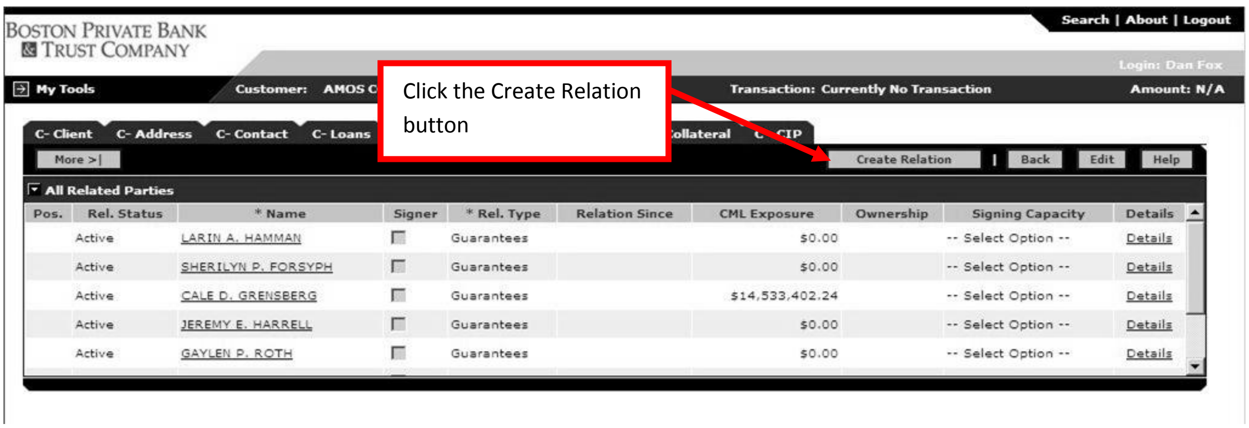
7. To delete the contact, click the Delete button.



Creating a Relationship

A relationship is an association between clients. To create a relationship:

1. On the Client window, click the C-Relationships tab. The All Related Parties list shows all current relationships.
2. Click the Create Relation button. The Relations tab appears.



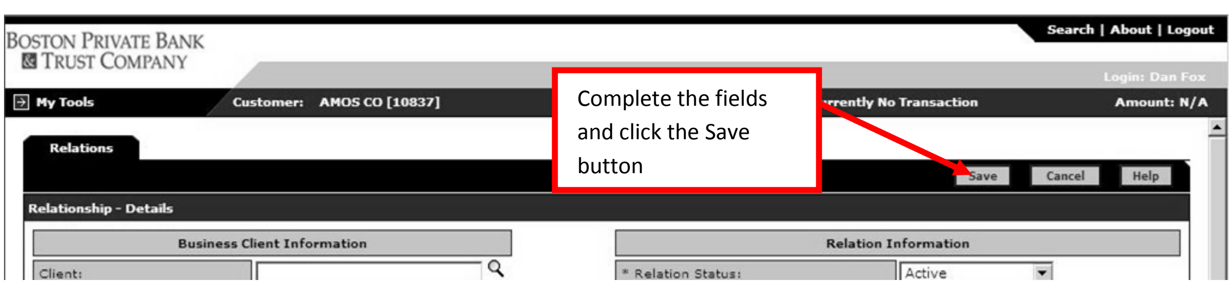
3. Complete the required fields and drop-down lists.

Note: You can click the search icon. If the client is already in SCOPE the fields populate automatically.

4. Complete additional fields and drop-down lists as needed.

5. Fill in the Relation Information fields.

6. Click the Save button. SCOPE creates the relationship.



Section 3: Initiating a Loan

Creating a Finance Request (Loan)

A finance request is a request to initiate one or more new loans, renewals, or modifications to existing loans. You can

- Create a finance request for a current client
- Create a new client and then initiate the request

Note: Ensure that all client relationships are defined on the C-Relations tab before you create a Finance Request.

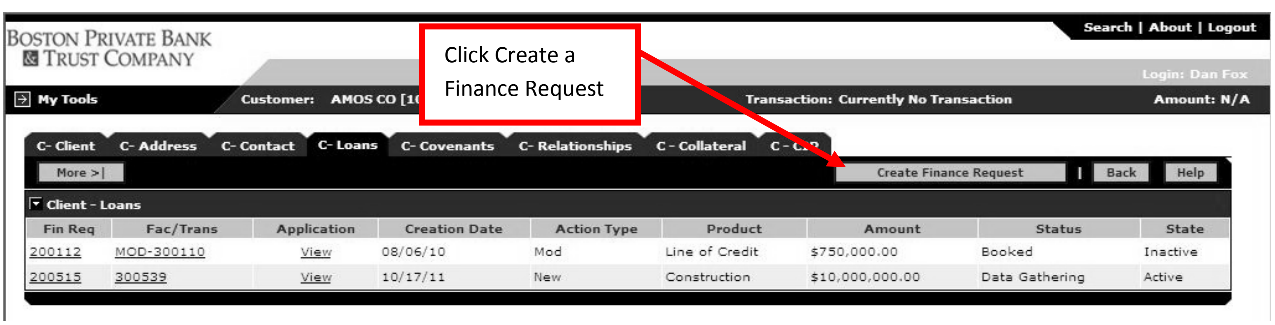
Creating a Finance Request for a Current Client

This section describes creating a finance request for new loans and for renewed or modified loans.

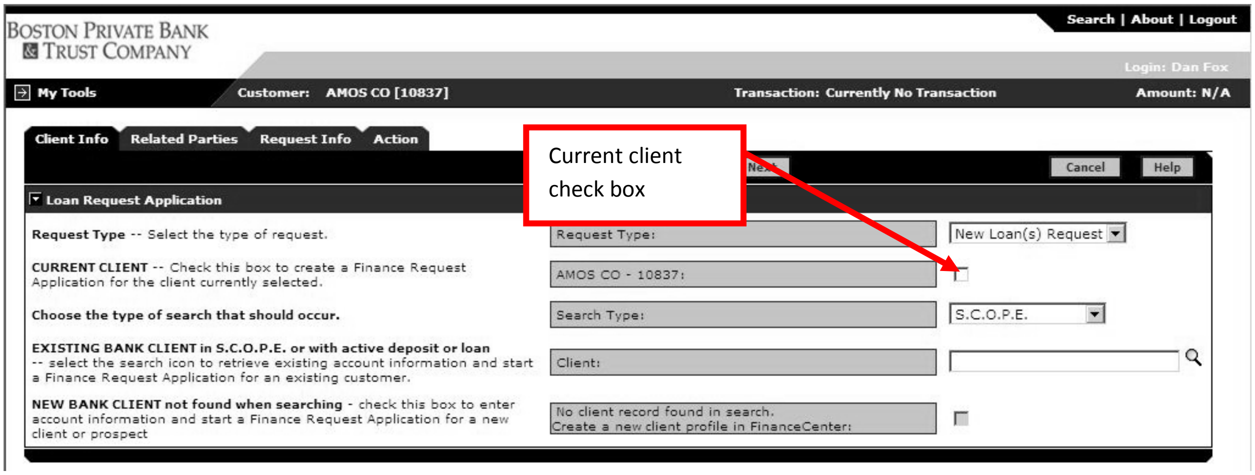
New Loan

To create a finance request for a new loan for the current client:

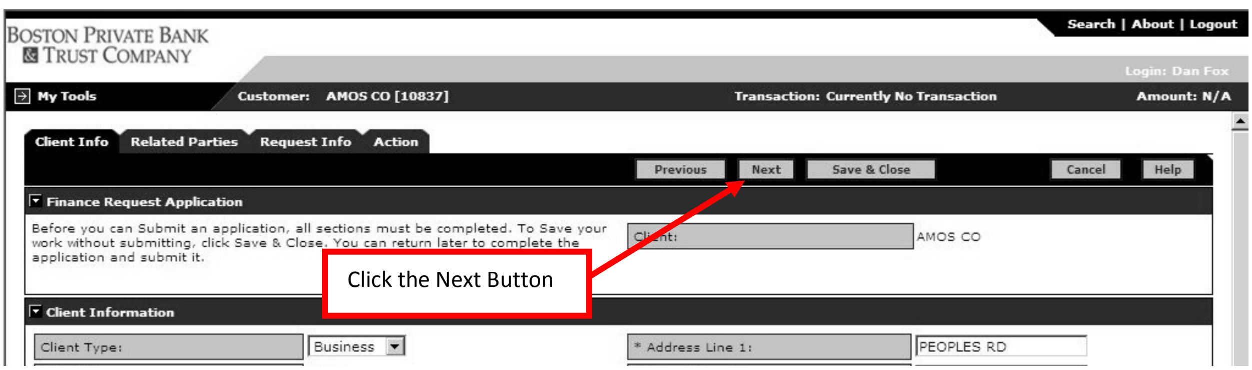
1. Select a client. In this example, we select the Amos Company.
2. On the client window, click the C-Loans tab. The Client – Loans window appears. It lists the past and current finance requests for this client.
3. Click the Create Finance Request button. The Loan Request Application portlet appears.



4. Check the current client check box. The Finance Request Application window appears. It displays client information.

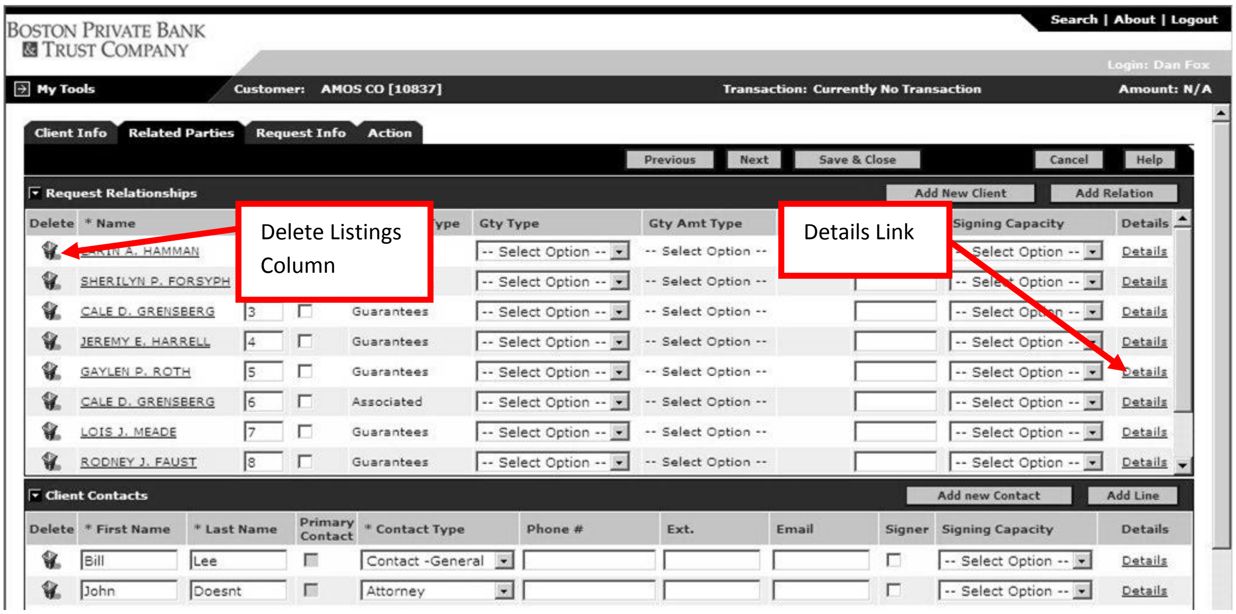


5. Click the Next button.



6. The fields are already completed for the client. Edit the fields and drop-down list selections if needed.

7. Click the Next button. The Related Parties window appears.



If the current customer has relationships that are defined on its customer tab, the first relationships section (Request Relationships) appears and lists those relationships.

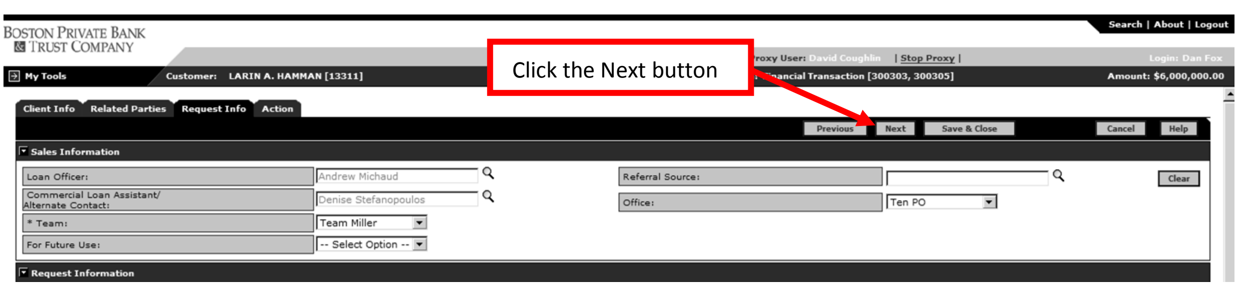
8. Delete any listings that do not apply to this Finance Request.

The second section of the window contains contact information from the customer contact tab. Click the Details link to view more information about the contacts.

9. Complete the information as required for this request:

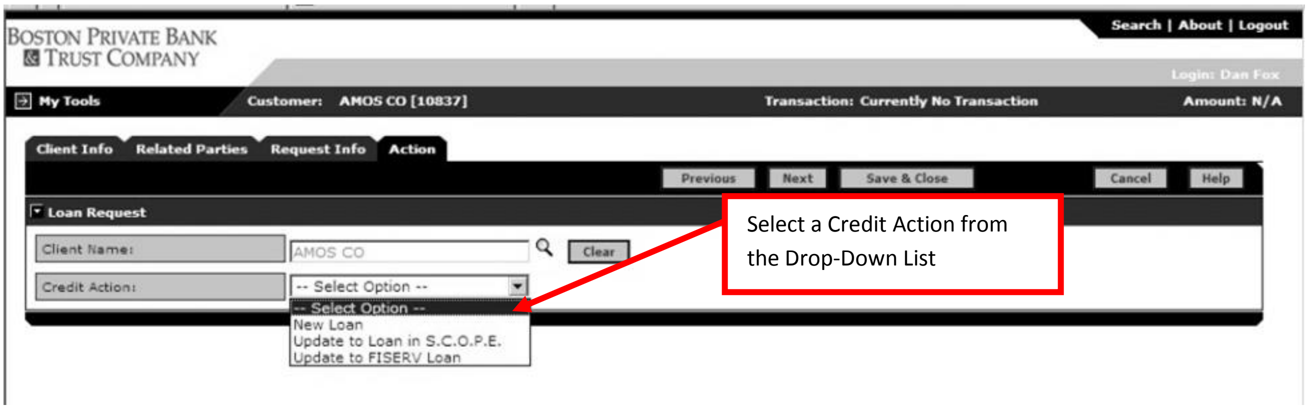
- If the person or company is to guarantee this loan, check the Signer box
- Select the type of guarantee for this person or company from the Gty drop-down list

10. Click the Next button. The Request Info tab appears.



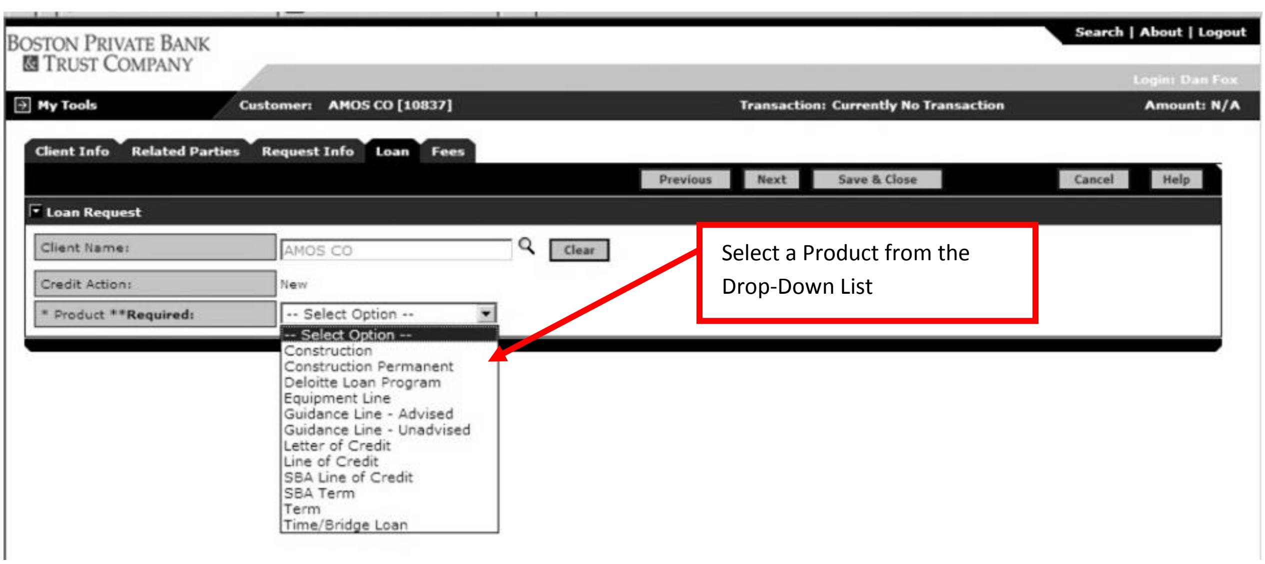
11. This window contains information about the sales team, the request, and the customer. Complete the fields as needed.

12. Click the Next button. The Action tab appears. It determines the purpose of the financial request.



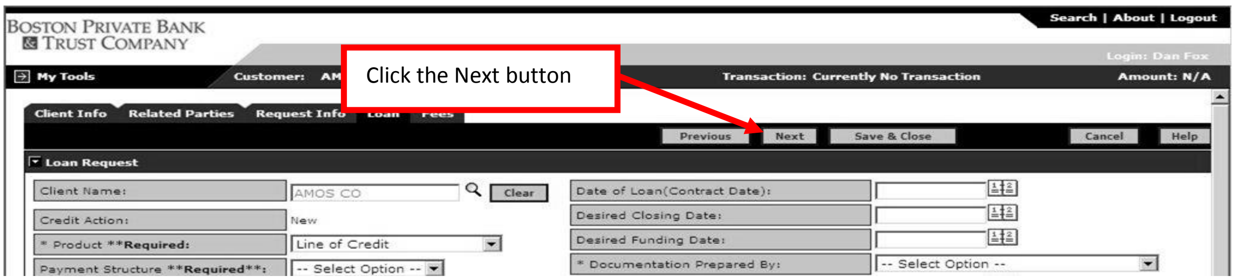
13. Select a Credit Action from the drop-down list. For a New Loan, for example, a specific drop-down list of loan types (Products) appears.

Note: The drop-down list is also used for renewals, modifications, and other actions.

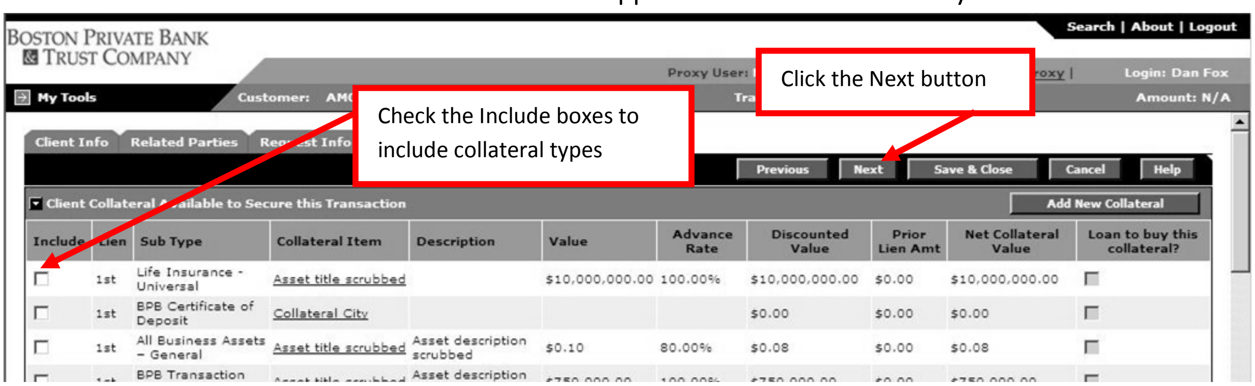


14. Select a Product from the drop-down list.

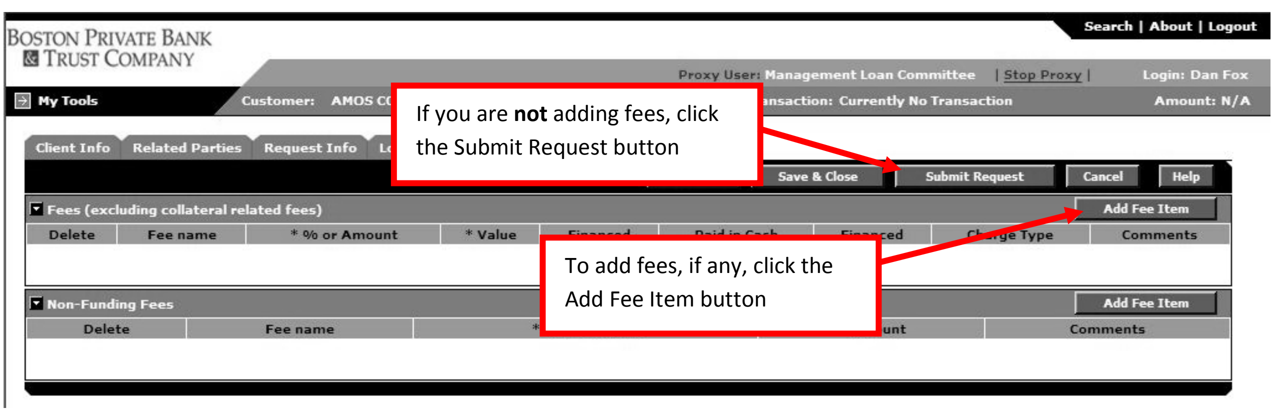
15. The Loan Request window appears. The content of the fields varies depending on the Product you selected in the previous step.



16. Fill in the fields as needed. As always, you must complete all required fields. Remember that required field names are preceded by an asterisk (*).
17. Click the Next button. The Collateral window appears for secured loans only.



18. Check the Include boxes to include each piece of collateral for this loan.
19. Click the Next button. The Fees tab appears.

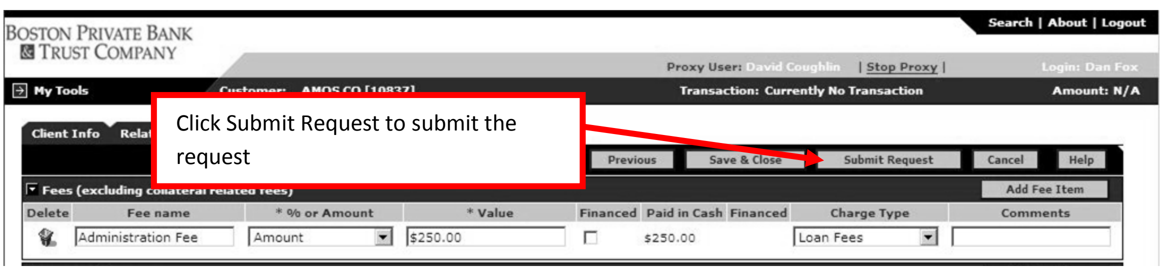


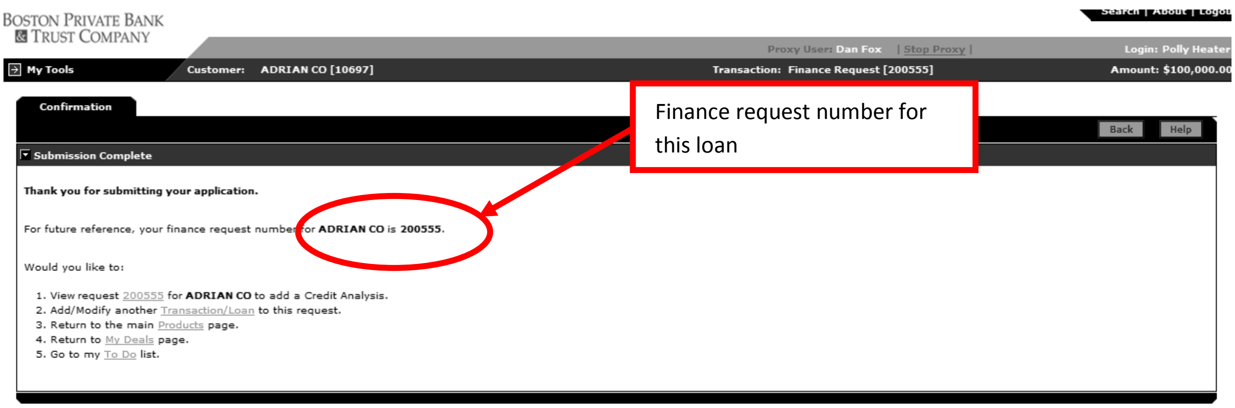
20. To add fees, click the Add Fee Item button. Otherwise click the Submit Request button to submit the Finance Request.

21. Select a Fee Name from the drop-down list. You can select either type of fee or both types. The Fee line you selected appears.

22. Repeat the previous steps to add additional fees as needed.

23. Click Submit Request to submit your loan request. The Confirmation tab appears. Note your finance request number for future reference.





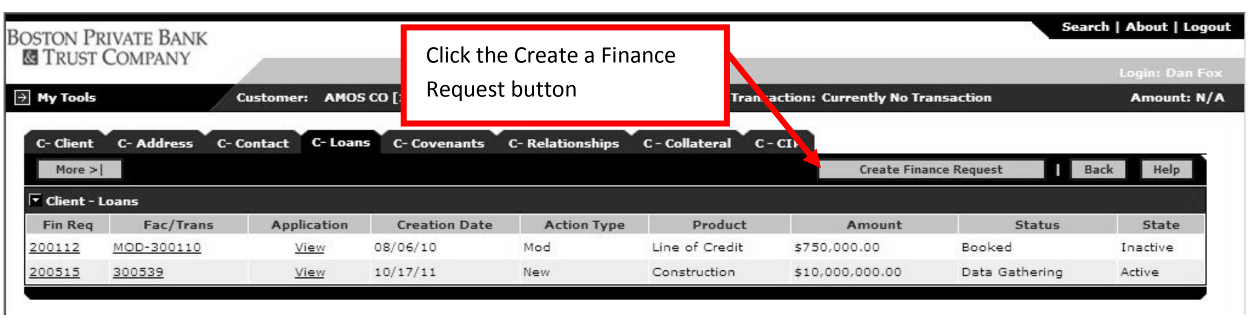
24. To add an additional transaction, click the link in #2 in the list on the Confirmation tab. If the transaction belongs to a different client, contact your system administrator for information. The finance request number serves as an identification number for the loan throughout its life.

Renewed or Modified Loan

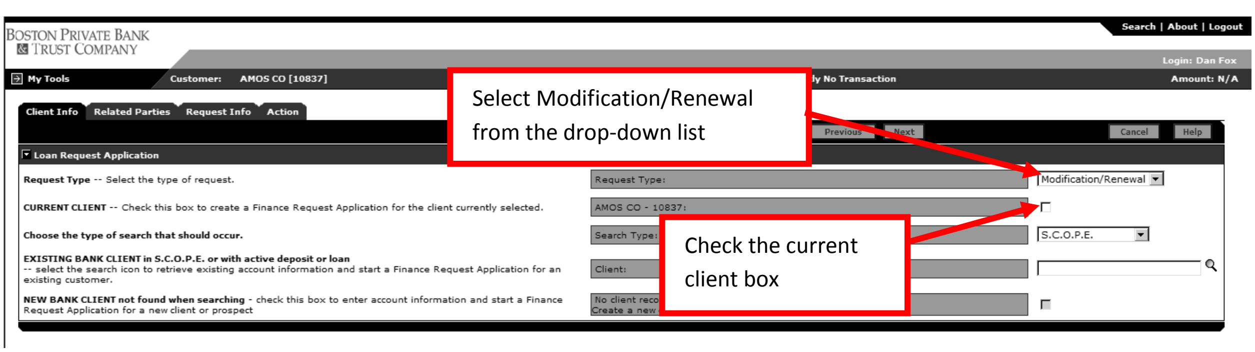
To create a finance request for a renewed or modified loan for the current client:

1. Select a client. In this example, we select the Amos Company.

2. On the client window, click the C-Loans tab. The Client – Loans portlet appears. It lists the past and current finance requests for this client.

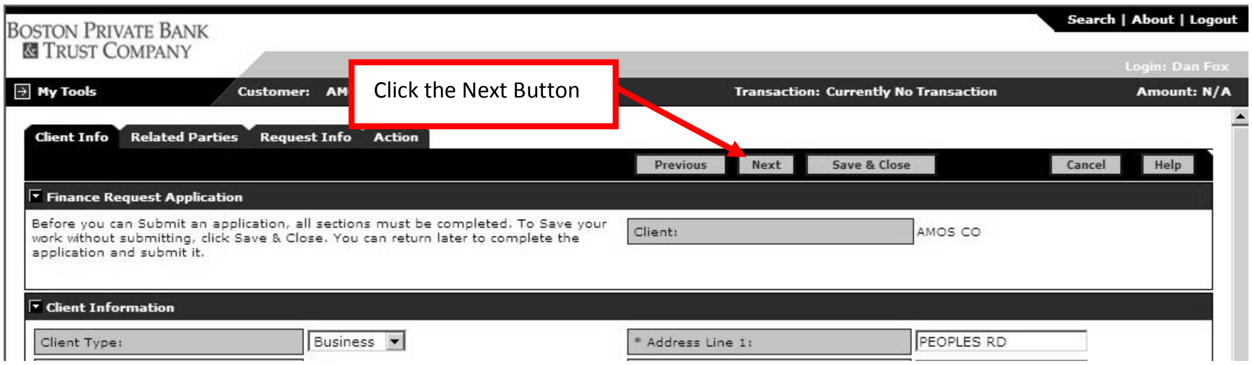


3. Click the Create Finance Request button. The Loan Request Application sub window appears.

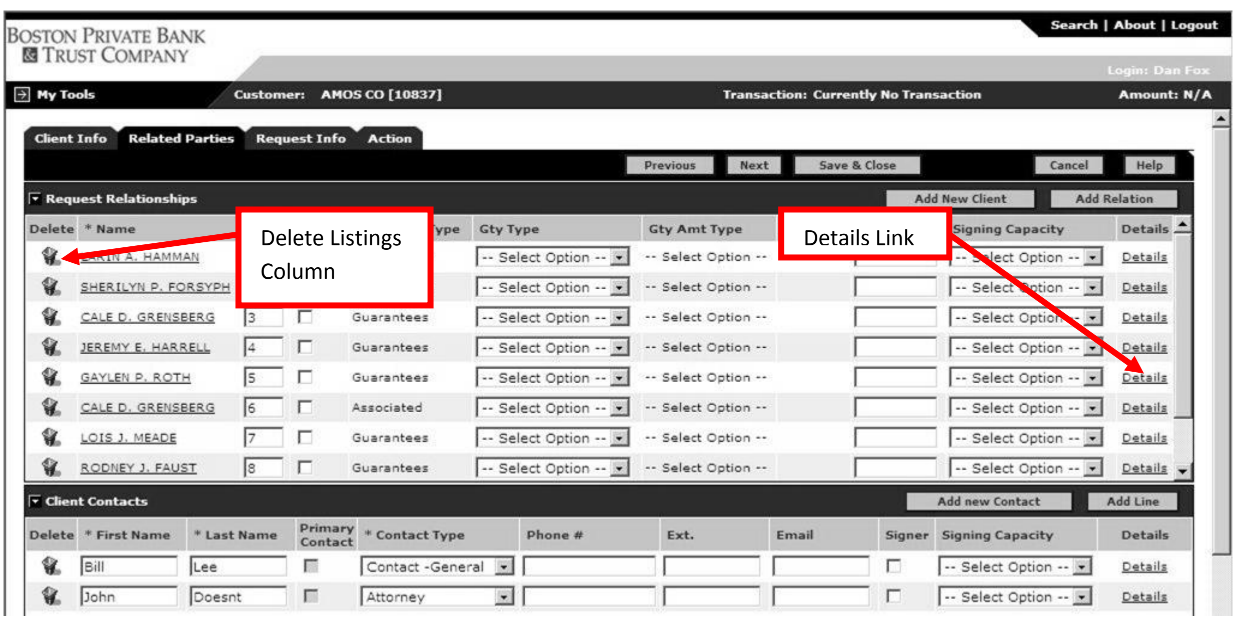


4. Check the current client box. The Finance Request Application window appears. It displays client information. Then select Modification/Renewal from the drop-down list

5. Click the Next button.



6. The fields are already completed for the client. Edit the fields and drop-down-list selections if needed.
7. Click the Next button. The Related Parties window appears.

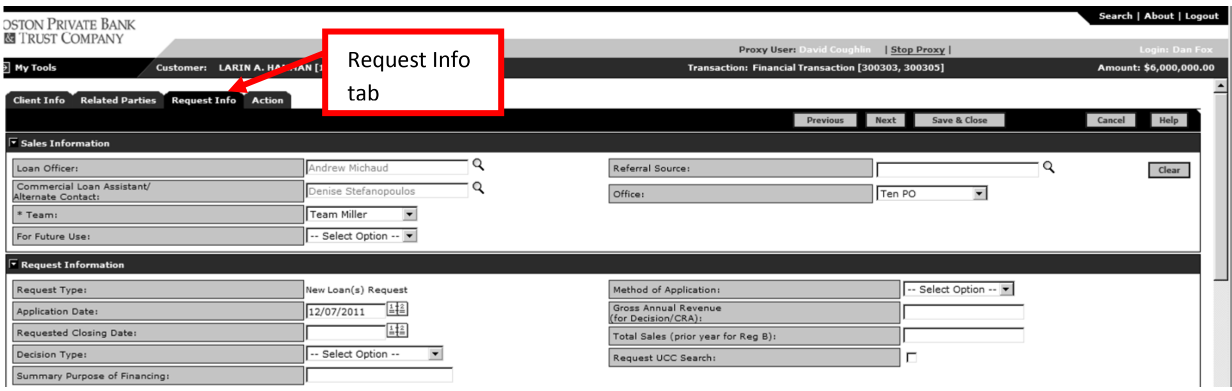


If the current customer has relationships that are defined on its customer tab, the first relationships section (Request Relationships) appears and lists those relationships.

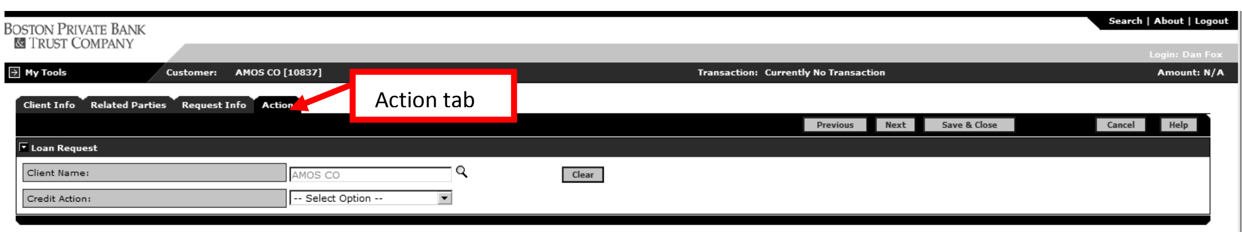
8. Delete any listings that do not apply to this Finance Request.

The second section of the window contains contact information from the customer contact tab. Click the Details link to view more information about the contacts.

9. Complete the information as required for this request:
    - If the person or company is to guarantee this loan, check the Signer box
    - Select the type of guarantee for this person or company from the Gty drop-down list
10. Click the Next button. The Request Info tab appears.



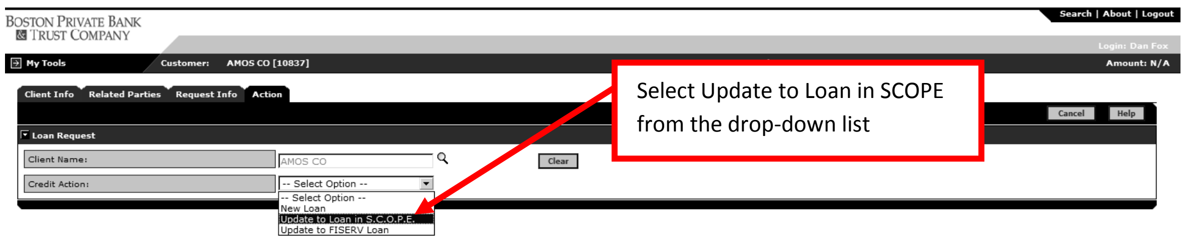
11. This window contains information about the sales team, the request, and the customer. Complete the fields as needed.
12. Click the Next button. The Action tab appears.



13. Determine whether you will update your loan in SCOPE or FISERV.
    - If the original or renewal loan has been done in SCOPE, select SCOPE for the update
    - If the loan has never been done in SCOPE, select FISERV

For our example we choose to update to a loan in SCOPE.

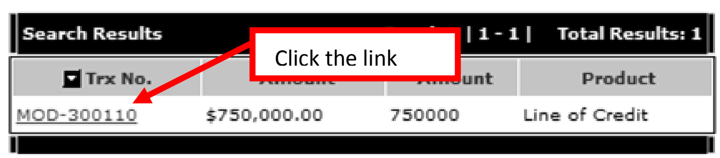
14. Select Update to Loan in SCOPE from the Credit Action drop-down. The Credit Action field becomes Update to Loan in SCOPE.



15. Click the search icon to the right of the Transaction field to locate the loan.

The Search tab appears. The Search Results sub window lists the existing loan for this customer.

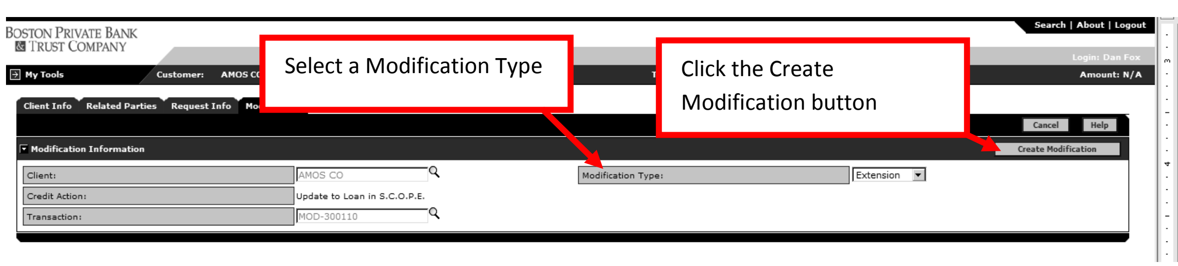
16. Click the Trx No. link.



The Transaction field now displays the loan number.

17. Select a Modification Type from the drop-down list. We select Extension.

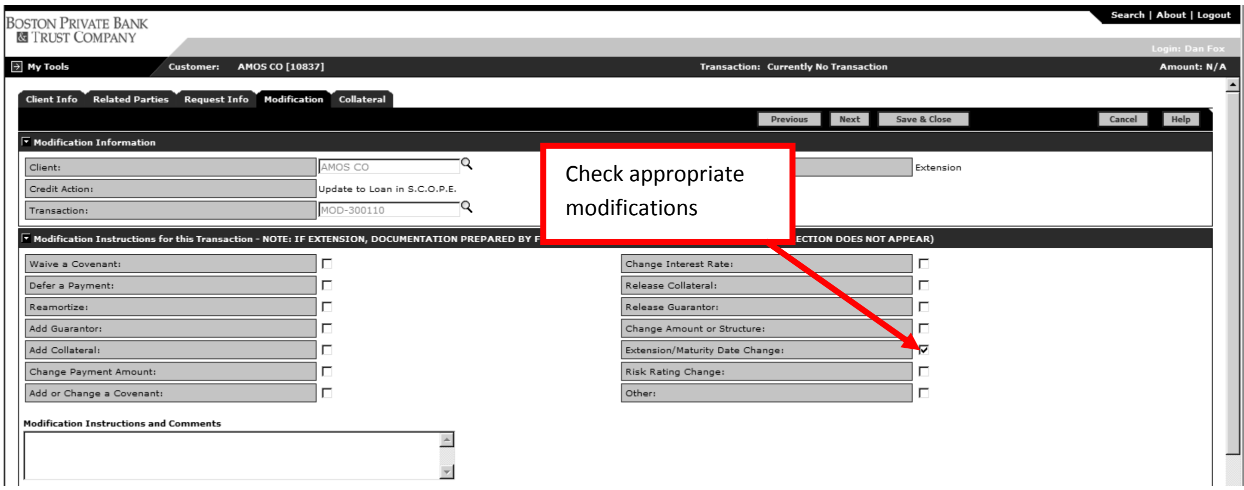
18. Click the Create Modification button.



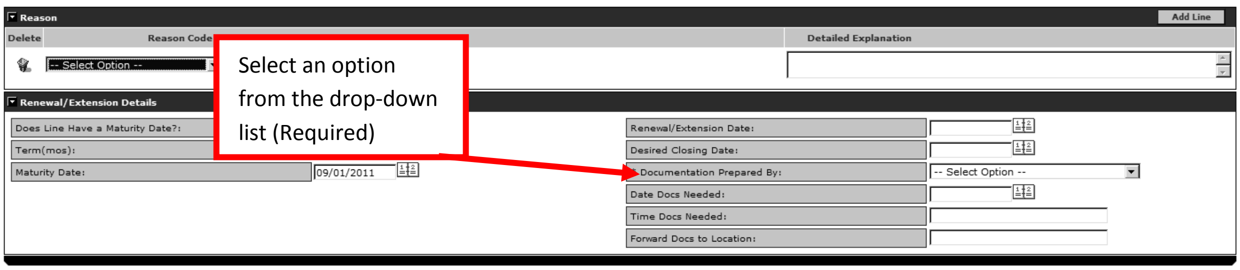
The Modification tab appears.

19. Check the appropriate boxes in the Modification Instructions portlet. We checked Extension/Maturity Date Change.

20. Optionally add Modification Instructions and Comments in the text box.

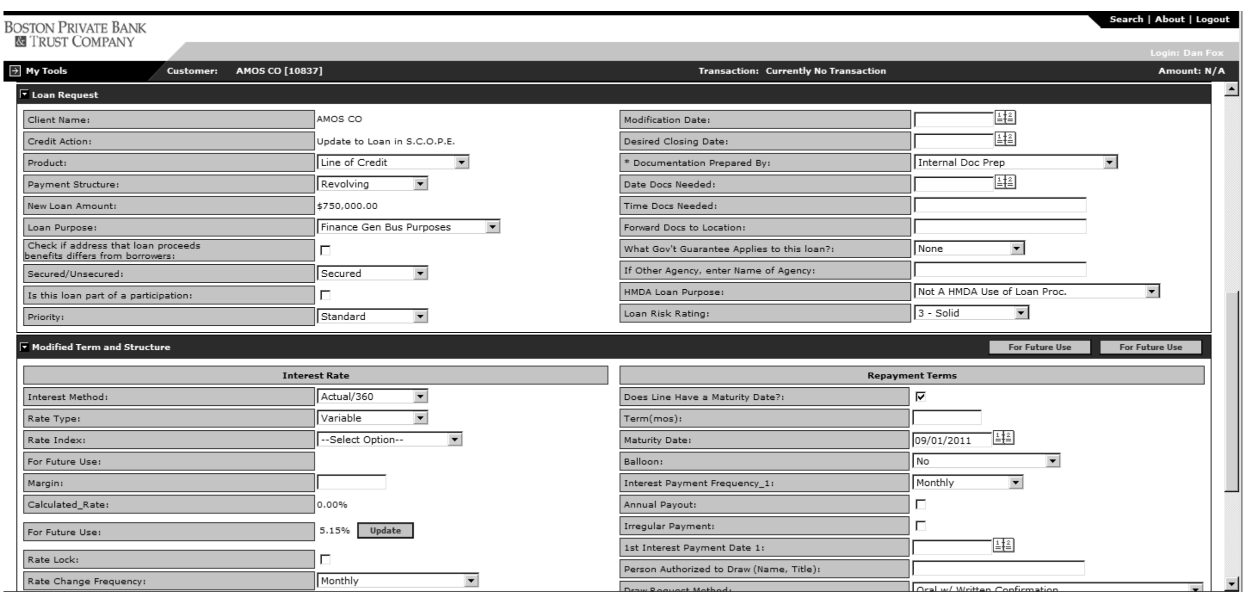


21. Scroll to the bottom portion of the window.
22. To display a reason for this loan modification, click the Add Line button and select a Reason from the drop-down list.
23. In the Renewal/Extension Details portlet, Documentation Prepared By is a required field. Make a selection from the drop-down list.



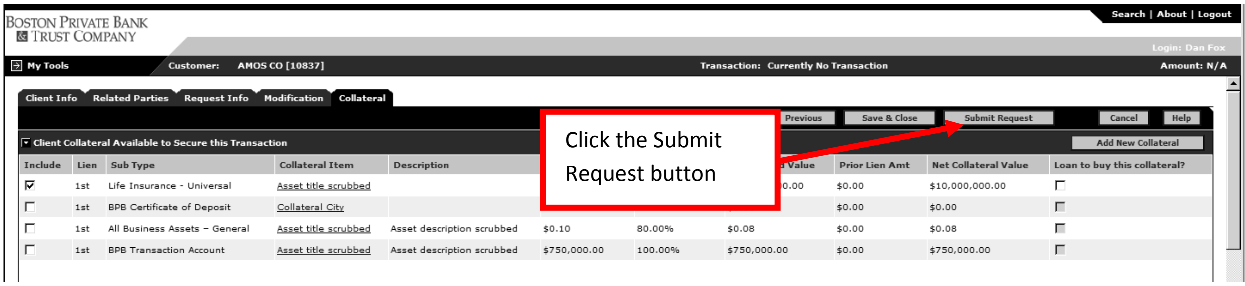
24. Optionally fill in other details.

The lower portion of the window expands to include the Loan Request and Modified Term and Structure portlets.



25. Make the needed modifications to the loan.

26. Click the Next button. The Collateral tab appears.



27. Make any needed changes to the loan collateral.

28. Click the Submit Request button. The confirmation tab appears.

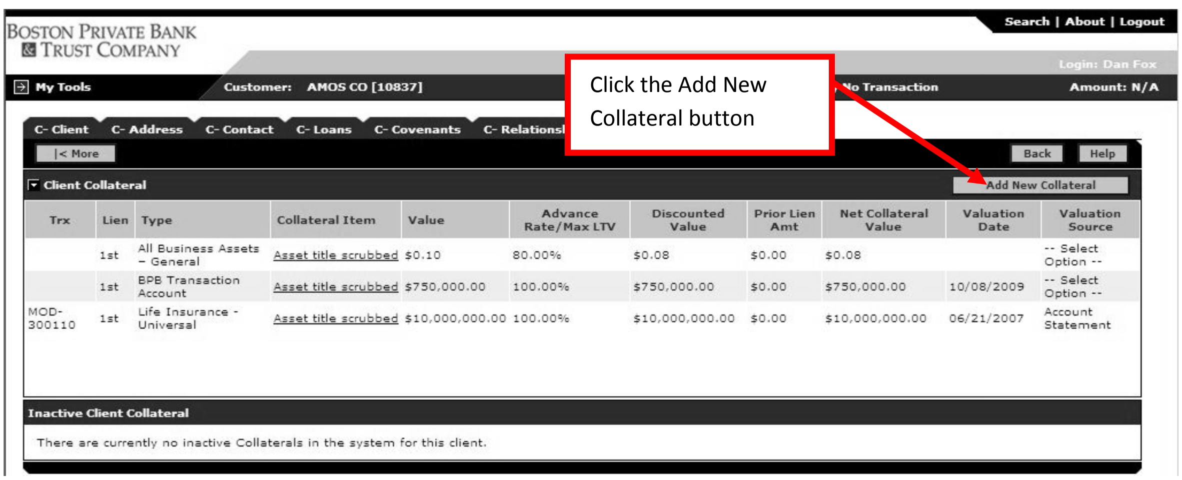
Creating a Finance Request for a New Client

The easiest way to create a finance request for a new client is to first create the client as described in Creating a New Client on page 29. Remember that you must first search twice for the client to ensure that the client does not already exist: once in SCOPE, then in FISERV. Then proceed as with a current client.

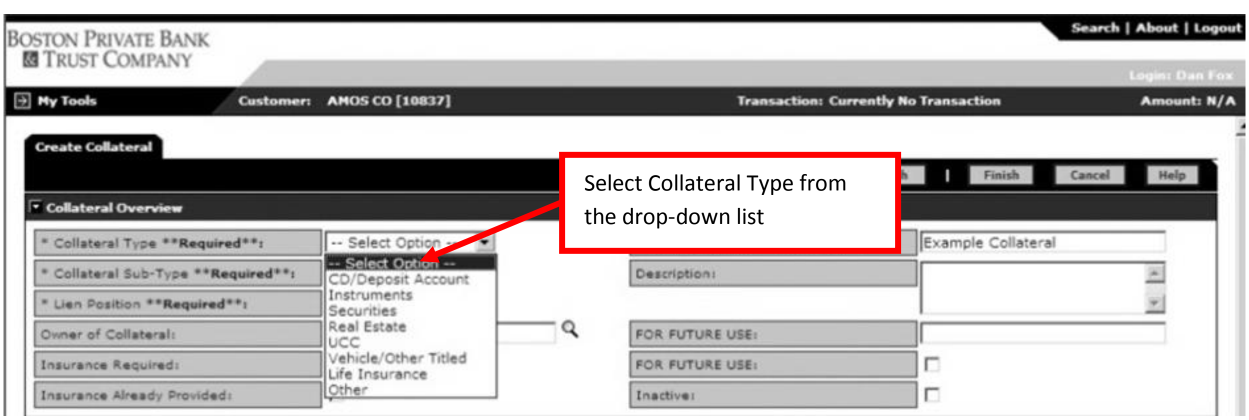
Creating New Collateral

To create new collateral for a client from the C-Level, begin with step 1. If you have launched the Create Collateral screen from a different window (for instance, the Finance Request Wizard or T-Collateral Analysis screen), begin at step 2.

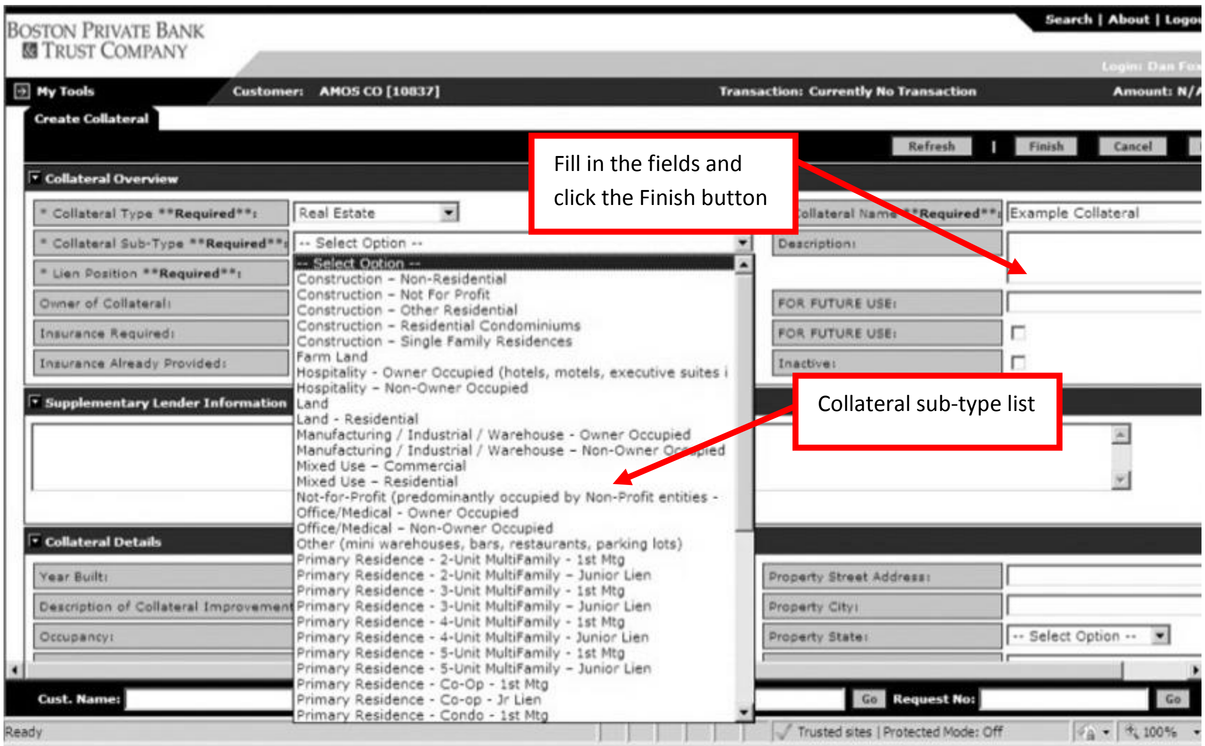
1. On the client window, click the C-Collateral tab. The C-Collateral window appears. The tab displays current collateral for this client.
2. To edit an existing collateral item, click on the Collateral Item hyperlink.



3. Click the Add New Collateral button. The Create Collateral window appears.
4. Select Collateral Type from the drop-down list. Your choice determines the items that populate the Collateral Sub-Type list.



We select Real Estate. Now the Collateral Sub-Type list becomes:

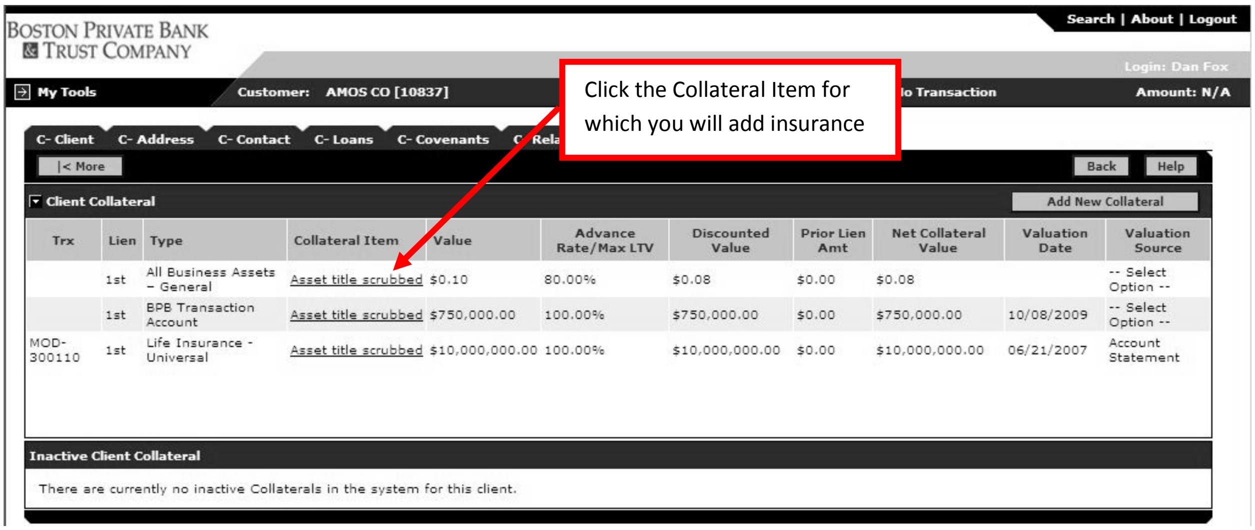


5. Select a Collateral Sub-Type from the drop-down list.
6. Fill in the Collateral Name field using naming conventions. See Appendix B on page 83.
7. Complete optional fields and drop-down lists as needed.
8. Click the Finish button.

Adding Insurance to a Collateral Item

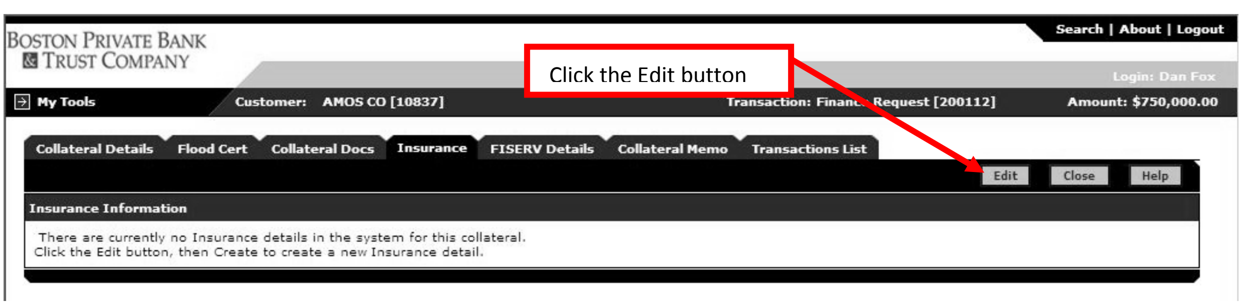
To add insurance to a collateral item:

1. On the client window, click the C-Collateral tab. The C-Collateral window appears. It displays current collateral for this client.



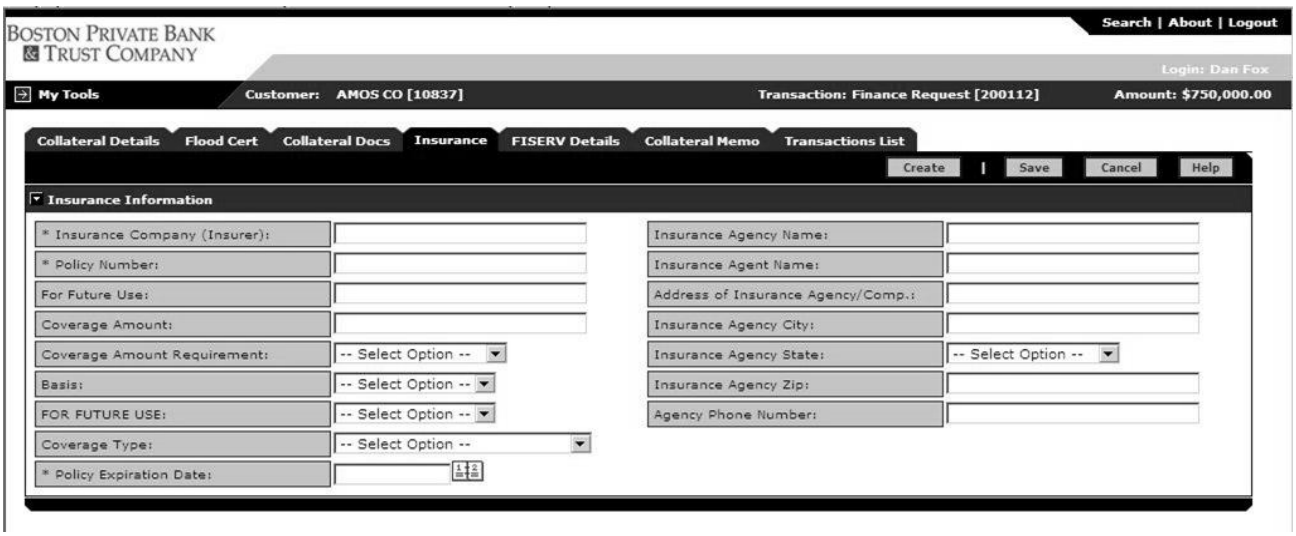
2. Click the Collateral Item for which you will add insurance. The Collateral Details window appears.

3. Click the Insurance tab. The Insurance window appears.
4. Click the Edit button to add new insurance or edit existing insurance.

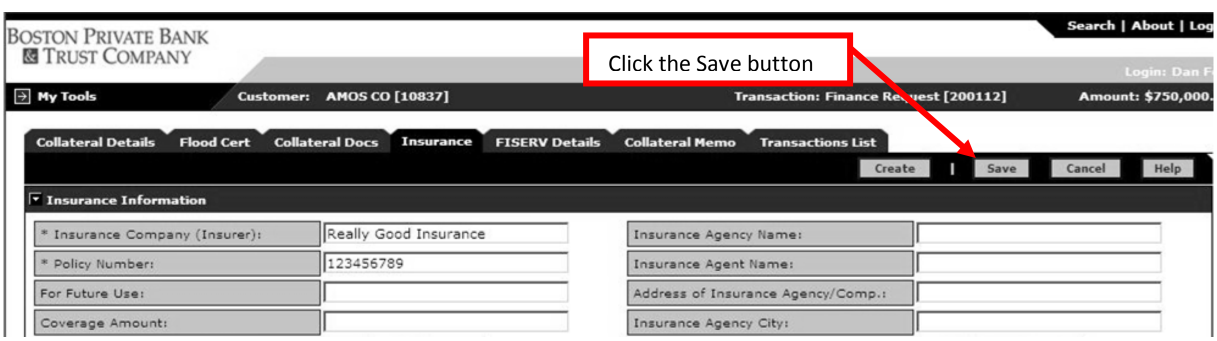


5. Click the Create button.

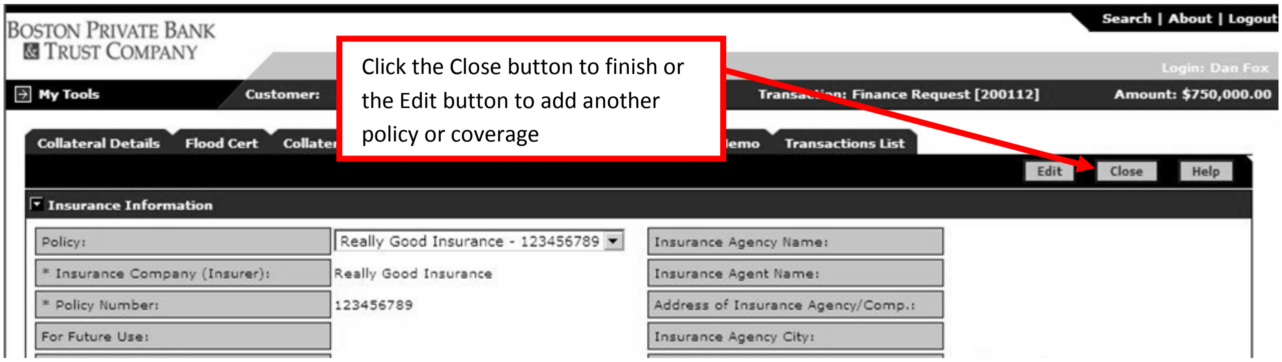
The Insurance Information portlet appears.



6. Fill in the fields according to the information on the insurance certificate.
7. Click the Save button.



The updated Insurance window appears.



8. Click the Close button to finish or the Edit button to add another policy or coverage.

Creating and Editing an Exposure Record

You can create a new exposure record or edit an existing record.

Creating an Exposure Record

When you create a financial request, exposure is automatically performed in background and SCOPE creates an exposure record. You can verify that it is correct and edit it if needed. You can also create exposures manually – contact your system administrator for information.

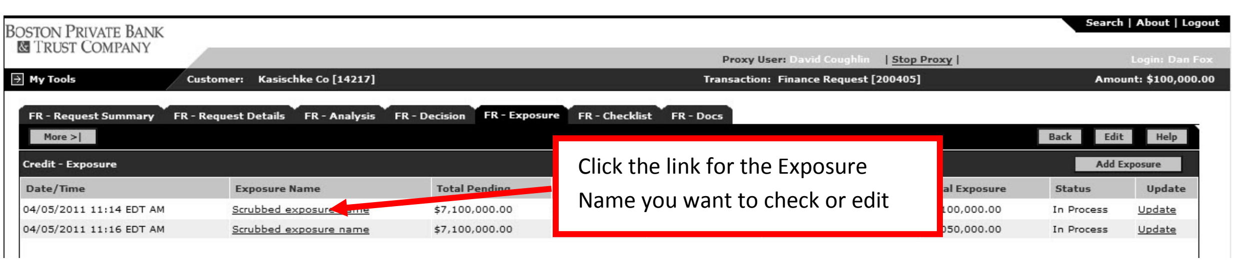
Checking and Editing an Exposure Record

You can view an existing exposure record, determine if it is complete and correct, and edit it if needed.

To check or edit an existing exposure record:

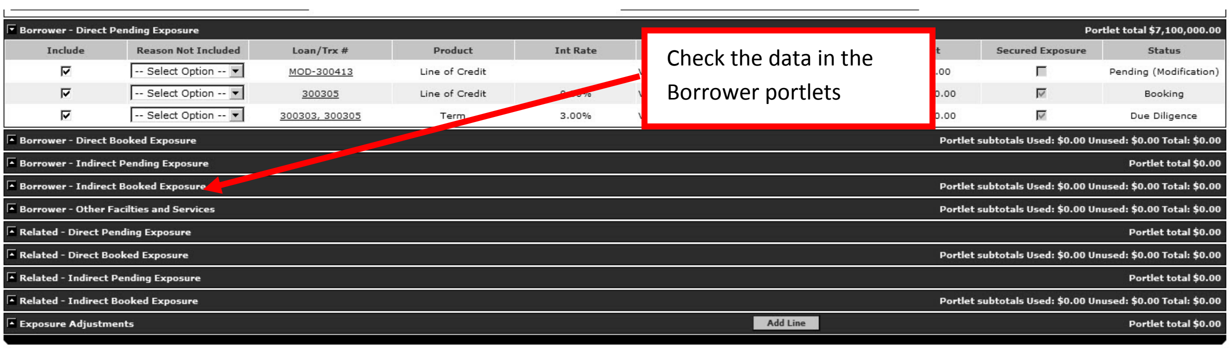
1. From the FR- tab set, click the FR-Exposure tab. The Credit – Exposure list appears.

2. Check the most recent exposure record and determine if it is correct.

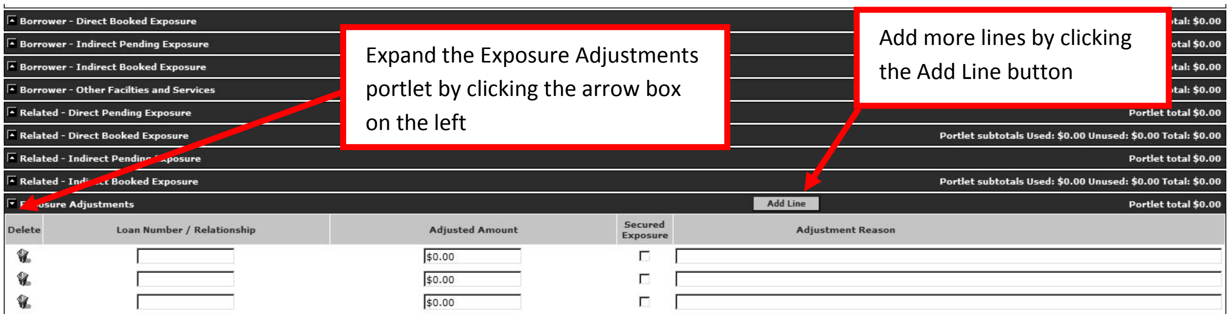


3. Click the link for the Exposure Name you want to check or edit. The Exposure Details tab appears.

4. Check the Exposure Details fields for accuracy. Then scroll to the bottom of the window and check the data in the Borrower portlets.



5. To include or exclude an exposure, click the Edit button. For renewals or modifications:
   - If there is no increase or decrease to the existing loan, uncheck the pending exposure record
   - If the finance request includes an increase or decrease to an existing loan, uncheck the booked exposure for that loan
   - Include a reason for the modification from the Reason Not Included drop-down list, for example, Duplicate
6. To make exposure adjustments, expand the Exposure Adjustments portlet by clicking the arrow box on the left:



You can optionally add one or more lines by clicking the Add Line button.

7. Enter the Loan Number or Relationship for which you want to adjust exposure.
8. Enter the Adjusted Amount; that is, the increase or decrease in exposure. Use a minus sign to indicate reductions.
9. Check the Secured Exposure box if you are modifying a secured exposure.
10. Enter a reason for the adjustment in the Adjustment Reason text box. Permitted reasons include:
    - Limited guarantor
    - Participated Amounts
    - Personal Residential Mortgage
11. When you are finished, click the Save button and the Close button.