APPLICATION CHECKLIST

{ } Loan Application
{ } Business Plan
{ } Job Schedule and Creation
{ } Proof of Matching Funds
{ } Equipment List (if purchasing with funds borrowed)
{ } Documentation of Collateral
{ } Purchase or Lease Agreement (property acquisition)
{ } Property Appraisal, Site Survey (if applicable), Legal Description of Property
{ } Insurance Policy or Binder (closing purposes)
{ } Personal Financial Statements of Owner(s)
  • Tax Returns of Owners (3 years)
  • Resume of Owner(s)
{ } Financial History (3 years)
  • Balance Sheet
  • Profit & Loss Statement
  • Cash Flow Statement
  • Tax Returns of Business
{ } Financial Projections (3 years)
  • Balance Sheet
  • Income Statement
  • Cash Flow Statement