



Checklist for Required Documentation for Loans

Name of Client/Company: _____

- _____ **Business Plan or Executive Summary (less than 10 pages)**
- _____ **Monthly cash flow projections for the next year**
- _____ **Personal federal income tax returns (last 3 years) for owners with 20% or more interest in the business**
- _____ **Personal financial statement for owners with 20% or more interest in the business (dated within 90 days of the application)**
- _____ **Business federal income tax returns for last 3 years, or life of business if shorter**
- _____ **Business balance sheet + income statement (within 90 days of the application)**
- _____ **Copy of lease or rental agreement (if applicable)**
- _____ **Copy of Buy/Sell Agreement (if applicable)**
- _____ **Proof of funds: Provide current bank statements, investments statements, and bank loan commitment as applicable**

With questions, please contact:

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