



## 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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