



Document Checklist

Submission of the following documents are required in order to process a loan application:

Application Documents:

- Complete Loan Application
- Business Executive Summary
- Business Plan – *For Startup Applicants*
- Personal Financial Statement(s) – *For each owner of 20% or greater*
- Past 3 Years of Personal Tax Returns – *For each owner of 20% or greater*
- Resume(s) – *For all key managers*
- Interim Financial Statements – *Year-to-date income statement and balance sheet*
- Past 3 Years of Business Tax Returns
- Financial Projections – *Two years of income statements detailed monthly including written assumptions*

If Applicable:

- Bids & Estimates – *For equipment, construction, renovations, etc.*
- Purchase Agreement(s)
- Affiliate Business Financials – *Interim financial statements and tax returns*
- Franchise Agreement

