

SBA LOAN CHECKLIST

We want to make your SBA loan experience as easy as possible. The following checklist specifies all of the documents we will need to approve your qualified SBA loan.

1. _____ Personal financial statement. ✓
2. _____ Personal income tax returns for the last three years. ✓
3. _____ Resumes of principals. ✓
4. _____ Business profit and loss statement (no more than 90 days old). * ✓
5. _____ Business balance sheet (no more than 90 days old). * ✓
6. _____ Accounts payable / accounts receivable aging. * ✓
7. _____ Business income tax returns for the last three years. * ✓
8. _____ Income projection.
9. _____ By-laws / articles of incorporation. *
10. _____ Partnership agreement.
11. _____ History & description of the business (be brief, one page is fine). ✓
12. _____ References, recommendations, photographs, or other information relevant to the business.

If you have any questions concerning the information requested, please call any one of our four branches.

* *If applicable.*

✓ *Items necessary to determine qualification.*