## Small Business Loan Checklist

To keep the process simple and straight forward, use this Small Business Loan Application Checklist and remember to lean on us for guidance along the way. (Source: sba.gov)

TALK TO YOUR BANK	NOTES
Your bank is a critical resource to keep yourself on track	NOTES
and in the right direction. No need to do it all on your own!	
GET ORGANIZED AHEAD OF TIME	
Set up files and folders (digital and physical) to keep	
documents and other materials organized so you can	
track them down quickly and easily.	
STATEMENT OF DEDSONAL HISTORY	
STATEMENT OF PERSONAL HISTORY	
Along with a valid form of ID, you'll want a formal document that provides more background on who you are. This also	
includes a personal financial statement.	
BUSINESS FINANCIAL STATEMENTS	
Includes Profit and Loss (P&L) statement for the past three	
years, year-end balance sheets for the past three years,	
reconciliation of net worth, interim balance sheet, interim	
P&L statements, and projected financial statements for at	
least one year.	
BUSINESS CERTIFICATE/LICENSE	
Original business license or certificate of doing business.	
LOAN APPLICATION HISTORY	
Records of any loans you may have applied for in the past.	
INCOME TAX RETURNS	
The three most recent years of returns for you and	
the business.	
RESUMES	
One for each principal involved.	
BUSINESS OVERVIEW AND HISTORY	
A history of the business and its challenges to date, along with explanation for requesting the loan.	
man explanation for requesting the loan.	Community
BUSINESS LEASE	Community   bank happy.
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Copy of the business lease or note for a landlord giving

terms for the proposed lease.