

BUSINESS LOAN APPLICATION - Check List

- Describe the Loan Request as best as possible including time-frame(s) and overall needs
- Fill in the Business Loan Application (attached). Be sure to include the complete Business name, address, contact information and Federal Tax Identification number
- List Principals by name, address, telephone number and social security number
- List additional Guarantors, by name, address, telephone and social security number
- Attach Financial Statements:
 - Personal financial statement (provided)
 - Company/business Income tax returns for the past three years
 - Personal Federal Income Tax Returns for the past three years – be sure to include all schedules
 - Interim, internal financial statements for the business (please include year-end if taxes not yet filed or year to date as applicable)
 - Business or personal debts not listed on financial statements, credit report(s), etc. (provided)
 - Any pro-forma projections for current year (or beyond if applicable)
- If applicable, provide your Business Plan. If you do not have a written business plan, please complete the “Business Description” form attached below
- Name, address and contact information of your insurance agent, accountant and attorney (on form provided below)
- Provide a copy of the legal description and tax identification number for real estate loans
 - Also provide a copy of paid tax receipts for said real estate
- Please provide any additional pertinent information you feel is important for the loan consideration.



Locally connected. Personally invested.

Business Agents

Accountant Information

Name: _____
 Organization: _____
 Address _____

 Phone: _____
 E-mail: _____
 Fax: _____
 Website: _____

Insurance Agent

Name: _____
 Organization: _____
 Address _____

 Phone: _____
 E-mail: _____
 Fax: _____
 Website: _____

Attorney

Name: _____
 Organization: _____
 Address _____

 Phone: _____
 E-mail: _____
 Fax: _____
 Website: _____

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