

# SBA Application

All information and documentation listed below is required.



Required documentation	Rec'd?	
Owner Financials (required for all 20% owners)	<input type="checkbox"/>	2016-2018 Personal Tax Returns
	<input type="checkbox"/>	Completed Personal Financial Statement
	<input type="checkbox"/>	Personal Credit Report
Business Financials	<input type="checkbox"/>	2016-2018 Business Tax Returns
	<input type="checkbox"/>	Interim Income Statement and Balance Sheet
	<input type="checkbox"/>	Completed Debt Schedule
Transaction: All	<input type="checkbox"/>	Summary Use of Proceeds (below)
	<input type="checkbox"/>	Ownership identification totaling 100% (below)
	<input type="checkbox"/>	Address of business (below)
Transaction: Purchase	<input type="checkbox"/>	Purchase Agreement (draft OK)
	<input type="checkbox"/>	Amount of down payment: \$ _____
Transaction: Startup (includes business acquisition)	<input type="checkbox"/>	Business Plan
	<input type="checkbox"/>	Projections for 2 years
	<input type="checkbox"/>	New Legal Name Business and EIN #
Transaction: Franchise	<input type="checkbox"/>	Identification of Franchise Name (below)

## Project Summary

Business Name   
 Franchise Name (if applicable)

Business Locations

Business Owners (must total 100%)

<input type="text"/>	<input type="text"/>	%
<input type="text"/>	<input type="text"/>	%
<input type="text"/>	<input type="text"/>	%

\$  Purchase CRE (must occupy 51% of sq ft at closing)

Will this replace current location?  Yes  No

Planning to form RE Holding Company?  Yes  No

\$  Refinance of Existing Debt

\$  Renovations/ Improvements/ Construction

\$  Business Acquisition

\$  Working Capital. Specifically: \_\_\_\_\_

\$  Machinery & Equipment

\$  Other : \_\_\_\_\_