



# Business Loan Package Checklist

Use this handy checklist to gather the necessary documents required for financing.

## Personal Items

## Completed

Service Agreement	<input type="checkbox"/>
Credit Information Disclosure Authorization	<input type="checkbox"/>
Personal Financial Statement (Assets – Liabilities = Net Worth)	<input type="checkbox"/>
Detailed Personal Budget (Monthly Living Expenses)	<input type="checkbox"/>
Two or Three Years Individual Tax Returns (Personal or Business)	<input type="checkbox"/>
Resume of Company Principals (References)	<input type="checkbox"/>
Bank Loan Application (Three Preferred Banks)	<input type="checkbox"/>
S.B.A. Loan Application for Business Loan	<input type="checkbox"/>
List of Personal Bank Accounts	<input type="checkbox"/>

## Business Items

Management Summary Information	<input type="checkbox"/>
Loan Request Summary Sheet	<input type="checkbox"/>
Source and Use of Funds	<input type="checkbox"/>
Business Plan	<input type="checkbox"/>
Personal Items Offered as Collateral	<input type="checkbox"/>
Business Items Offered as Collateral	<input type="checkbox"/>
Financial Projections Income/Expense Worksheets (Three Years)	<input type="checkbox"/>
Financial Ratio Calculations	<input type="checkbox"/>
Verification of Authenticity	<input type="checkbox"/>
Real-Estate Location (Letter of Intent)	<input type="checkbox"/>
Certificate of Corporate Secretary	<input type="checkbox"/>
Environmental Questionnaire	<input type="checkbox"/>

## Franchisor Information

Collateral Material	<input type="checkbox"/>
Franchise Disclosure Document	<input type="checkbox"/>