



### **Documents needed to when applying for a Business Loan:**

- 1.) 3 years Business Tax Returns
  - Includes the borrowing entity as well as any affiliated businesses which you/your partners own at least 20%.
- 2.) 3 years Personal Tax Returns (for any principal owner 20%+)
- 3.) 3 years financial statements (including affiliated businesses with 20%+ ownership)
  - Please include the most recent interims as well
- 4.) Cash Flow Projections/Pro-forma Financial Statements, if available
- 5.) Rent Roll
- 6.) Signed leases and financial information for tenants, if available
- 7.) Purchase contract and addendums if applicable
- 8.) Current Personal Financial Statements for all partners on CBS form (attached)
- 9.) Business Debt Schedule for all business-related debt (each partner) (attached)
- 10.) Management Resume/Bio for each owner or attach resume
- 11.) Any details on the ownership structure, including the Operating Agreement and Articles of Incorporation/Organization.
- 12.) Bank statements to support balances listed on the PFS.
- 13.) Completed, signed, and dated Application (attached).