

SBA Application

All information and documentation listed below is required.



Required documentation Rec'd?

Owner Financials (required for all 20% owners)	<input type="checkbox"/>	2011-2013 Personal Tax Returns
	<input type="checkbox"/>	Completed Personal Financial Statement (template attached)
	<input type="checkbox"/>	Completed SBA Form 1919 (template attached)
	<input type="checkbox"/>	Personal Credit Report (authorization attached)
Business Financials	<input type="checkbox"/>	2011-2013 Business Tax Returns
	<input type="checkbox"/>	Interim Income Statement and Balance Sheet
	<input type="checkbox"/>	Completed Debt Schedule (template attached)
Transaction: All	<input type="checkbox"/>	DUNS #. Available at: https://fedgov.dnb.com/webform
	<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 _____
 Business DUNS # (Required) _____
 Franchise Name (if applicable) _____

Business Locations _____

Business Owners (must total 100%)	_____	_____ %
	_____	_____ %
	_____	_____ %
	_____	_____ %

\$ _____ 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 : _____