



Thank you for your interest in an SBA 504 loan.

Please provide the following items for a Preliminary Loan Approval:

Business Information (for all businesses in which applicant owns 20%, and both buyer and seller if loan is for a business acquisition)

- _____ Last 3 years Business Tax Returns (complete copy)
- _____ Interim Financial Statements (within 60 days)
- _____ Business Debt Schedule
- _____ A/R and A/P Agings (same date as interim balance sheet)
- _____ 3 years Projections (if in business less than 2 years or to support cash flow)
- _____ Signed 4506-T

Personal Information (each 20% owner of the company)

- _____ Form 413 Personal Financial Statement
- _____ Form 912 Statement of Personal History
- _____ Last 3 years Personal Tax Returns
- _____ Management Resume

If Applicable

- _____ Purchase Agreement for Real Estate and/or Construction Estimate
- _____ List of Equipment to be purchased
- _____ Evidence of down payment (*Bank statement, Line of Credit, Seller Carry Note, Brokerage Account statements*)
- _____ UFOC and executed Franchise Agreement