

## **SBA APPLICATION CHECKLIST**

a. BORROWER INFORMATION FORM – SBA FORM 1919   SEE FORM IN PACKET	1.	GEN	IERAL REQUEST INFORMATION AND SBA FORMS	
SEE FORM IN PACKET		a.		
SEE FORM IN PACKET		b.	·	
a. THREE YEARS OF BUSINESS FEDERAL TAX RETURNS [INCLUDE ALL STATEMENTS AND SCHEDULES]  b. INTERIM FINANCIAL STATEMENTS (P&L, BALANCE SHEET, A/R AGING, & A/P AGING) [DATED WITHIN 60 DAYS OF THIS APPLICATION]  c. IF STARTUP OR PURCHASING EXISTING BUSINESS, PROVIDE THE FOLLOWING:  i. FINANCIAL PROJECTIONS – COVERING THREE YEARS WITH THE FIRST TWELVE MONTHS BROKEN DOWN MONTH-BY MONTH, INCLUDE A BRIEF NARRATIVE OF UNDERLYING ASSUMPTIONS.  ii. BUSINESS PLAN / SUMMARY  3. PERSONAL INFORMATION  a. THREE YEARS OF PERSONAL FEDERAL TAX RETURNS [INCLUDE ALL STATEMENTS AND SCHEDULES]  b. PERSONAL FINANCIAL STATEMENT – SBA FORM 413 [SEE FORM IN PACKET]  c. MANAGER AND/OR OWNER RESUME [PROVIDE IN YOUR OWN FORMAT]  4. PROJECT SPECIFIC INFORMATION (INCLUDE AS APPLICABLE)  a. ASSET PURCHASE  ii. REAL ESTATE PURCHASE – PURCHASE CONTRACT OR LETTER OF INTENT, MOST RECENT APPRAISAL & ENVIRONMENTAL, IF AVAILABLE.  iii. PURCHASE OF EXISTNIG BUSINESS – PURCHASE CONTRACT OR LETTER OF INTENT, SELLER FINANCIAL STATEMENTS, 4506-T SIGNED BY SELLER, REASON BUSINESS IS BEING SOLD.  iii. EQUIPMENT PURCHASE – DETAILED LISTING WITH MODEL/SERIAL#, COPY OF INVOICE OR ESTIMATED COST.  b. DEBT REFINANCE [COPY OF NOTE(S) TO BE REFINANCED, 24 MONTHS OF PAYMENT HISTORY]		c.	·	
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b. DEBT REFINANCE [COPY OF NOTE(S) TO BE REFINANCED, 24 MONTHS OF PAYMENT HISTORY]		_	4506-T SIGNED BY SELLER, REASON BUSINESS IS BEING SOLD.	
[COPY OF NOTE(S) TO BE REFINANCED, 24 MONTHS OF PAYMENT HISTORY]			iii. <u>Equipment purchase</u> – detailed listing with model/serial#, copy of invoice or estimate	D COST.
c. CONSTRUCTION, INCLUDING TENANT IMPROVEMENTS		b.		
[CONTRACTOR BIDS WITH DETAILED COST BREAKDOWN]		c.	CONSTRUCTION, INCLUDING TENANT IMPROVEMENTS	



## **GENERAL REQUEST INFORMATION**

Signature of Authorized Representative

Category				Category				Dollar Amount			
Real Estate				Furniture/Fixtures							
		Other:									
Inventory											
Working capital				Other:							
Refinance Debt <sup>1</sup>				Total Project Cost							
Acquire Existing Business				(Less) Equity Injection							
Construction/Tenant Infill <sup>2</sup>				Loan Amount							
oies of note(s) a	nd 24 months of	payment	history.								
DEBT (INDICA	TE BY AN ASTERIO	CK (*) LO	ANS TO I			1					
Original	Present	Origi	nal	Maturity	%	Monthly	Collateral				
Amount					Rate	Payment					
		(IVIIVI)	YY)	(IVIIVI/YY)							
red "YES" provi	de an explanatior	n on a sep	oarate sh	eet of paper	)						
								YES		NO	
				ite?				YES		NO	
			5,				-		Н	NO	
Do any single customers account for more than 20% of your revenue?  Do any three customers collectively account for more than 50% of your revenue?										NO NO	
Is or will the business real estate be rented? If "YES" provide a copy of the lease agreement.										NO	
ESS AND EX	PECTED BENE	FITS OF	THE LO	DAN							
	Original Amount  Ted "YES" provious share any cocompany for the ing payroll and unt for more that the be rented? I	pies of note(s) and 24 months of \$10,000 or more SBA Form 601  DEBT (INDICATE BY AN ASTERI Amount Balance  Ted "YES" provide an explanation tes have any contingent liabilitie company for the purchase of coing payroll and real estate taxes ant for more than 20% of your restrively account for more than 50 ate be rented? If "YES" provide a	DEBT (INDICATE BY AN ASTERICK (*) LO Original Present Origi Amount Balance Date (MM/)  red "YES" provide an explanation on a separete have any contingent liabilities (leases company for the purchase of commercial ing payroll and real estate taxes, past due ant for more than 20% of your revenue? Itively account for more than 50% of your attention of the purchase of company for the purchase of commercial ing payroll and real estate taxes, past due ant for more than 20% of your revenue? Itively account for more than 50% of your attention of the purchase of company for the purchase of commercial ing payroll and real estate taxes, past due and the purchase of commercial ing payroll and real estate taxes, past due and the purchase of the purchase	Furnit Other	Furniture/Fixture Other: Other: Other:  Other:  Total Fixture Other:  Cless)  Loan Ar Dies of note(s) and 24 months of payment history. \$10,000 or more SBA Form 601 must be executed.  DEBT (INDICATE BY AN ASTERICK (*) LOANS TO BE PAID BY ID Original Present Original Maturity Amount Balance Date (MM/YY)  MM/YY)  Tred "YES" provide an explanation on a separate sheet of paper attes have any contingent liabilities (leases, guarantees, etc.)? Company for the purchase of commercial real estate? Integrating payroll and real estate taxes, past due? Unit for more than 20% of your revenue?	Furniture/Fixtures  Other:  Other:  Other:  Other:  Total Project C  (Less) Equity In  Loan Amount  Dies of note(s) and 24 months of payment history. \$10,000 or more SBA Form 601 must be executed.  DEBT (INDICATE BY AN ASTERICK (*) LOANS TO BE PAID BY LOAN PRO  Original Present Original Maturity %  Amount Balance Date (MM/YY) Rate  (MM/YY) (MM/YY)  Pred "YES" provide an explanation on a separate sheet of paper)  Interest have any contingent liabilities (leases, guarantees, etc.)?  Company for the purchase of commercial real estate?  Interest for more than 20% of your revenue?  Interest for more than 20% of your revenue?  Interest for more than 50% of your revenue?	Furniture/Fixtures  Other:  Other:  Other:  Total Project Cost  (Less) Equity Injection  Loan Amount  Dies of note(s) and 24 months of payment history. \$10,000 or more SBA Form 601 must be executed.  DEBT (INDICATE BY AN ASTERICK (*) LOANS TO BE PAID BY LOAN PROCEEDS)  Original Present Original Maturity % Monthly Amount Balance Date Date Rate Payment  (MM/YY) (MM/YY) Payment  Pred "YES" provide an explanation on a separate sheet of paper)  Interest have any contingent liabilities (leases, guarantees, etc.)?  company for the purchase of commercial real estate?  Interest of your revenue?  Interest of your revenue?	Furniture/Fixtures  Other:  Other:  Other:  Total Project Cost  (Less) Equity Injection  Loan Amount  Dies of note(s) and 24 months of payment history. \$10,000 or more SBA Form 601 must be executed.  DEBT (INDICATE BY AN ASTERICK (*) LOANS TO BE PAID BY LOAN PROCEEDS)  Original Present Original Maturity % Monthly Date Rate Payment (MM/YY)  Amount Balance Date Date Rate Payment (MM/YY)  Payment (MM/YY)  Pred "YES" provide an explanation on a separate sheet of paper)  Interest have any contingent liabilities (leases, guarantees, etc.)?  Company for the purchase of commercial real estate?  Interest for more than 20% of your revenue?  Interest for more than 20% of your revenue?  Interest for more than 50% of your revenue?	Furniture/Fixtures  Other:	Furniture/Fixtures  Other:	

Date