

Checklist



Please include the following information

Business Information:

- Business financial statements for the last 3 years
- 2 years Financial Projections (if business is less than 3 years old)
- Interim financial statement dated within the last 45 days
- Business debt schedule (form included) dated to match interim financial statement
- Federal tax returns for the last 3 years
- Articles of Incorporation and Company Bylaws (if incorporated)
- Articles of Organization and Operating Agreement (if LLC)
- Partnership Agreement (if partnership)
- Business License *and* Fictitious Business Name Statement (if proprietorship)
- Franchise Agreement
- Aging of business A/R and A/P, dated the same as the interim financial statements

Personal Information:

- Personal tax returns for the last 3 years
- Personal Resume
- Personal financial statement (form included)
 - Must be completed for each proprietor, partner, officer or stockholder owning 20% or more of the operating company or holding company. Must be dated within 30-45 days of application date.

Real Estate Information:

- Real Estate Purchase Agreement or settlement sheet
- Construction cost budget and/or equipment invoices
- Existing environmental studies