

LOAN APPLICATION CHECKLIST

Financial Documents

- Most recent 3 years personal tax returns
- Most recent 3 years business tax returns and financial statements
- Current balance sheet and income statement
- Business Debt Schedule, [download the SBA form here](#)
- Three years of financial projections, MMCDC recommends using the [Small Business Development Center \(SBDC\)](#) for assistance with projections.

Additional documents may be requested during the underwriting process. Please reach out to one of our lenders to [get your application started](#).

Use this checklist as a guide for the documents and financial information we will need to start processing your business loan application.

Business Documents

- Business Name, make sure this is registered with the [Secretary of State](#)
- Business Plan
- List of what the funds will be used for (purchase equipment, building, business acquisition, etc.)
- Organizational Documents
- Employer Identification Number (EIN)

Personal Documents

- Authorization to pull credit, [download the form here](#)
- [Personal Financial Statement \(PFS\)](#) for each business owner

Contact Us:

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