



Commercial Loan Application Checklist

Personal/Corporate Cash Flow:

- 2015, 2016 and 2017 Complete Personal and Corporate Tax Returns
 - >(Including All Schedules)
- 2017 Full Year Profit and Loss and Balance Sheets for All Corporations/Entities
- 2017 Full Year Personal Cash Flow Approximation (Including W2, If Applicable)
- Interim 2018 Profit & Loss and Balance Sheets for All Corporations/Entities
- Signed and Completed Personal Financial Statement (Blank Form Attached)
- Verification of Liquidity/Bank Statements (As Stated on Personal Financial Statement)
- Latest and Greatest 2 Months of Personal and Business Checking Account Statements

Guarantor/Borrower Information:

- Bio/Resume Information for All Guarantors
- Entity Information
 - >(ie. Formation Date, Partners/Members Full Names, Ownership Percentages)

Current Loan Information:

- Current Loan Facility Details (Most Recent Statement)
- Detail for Use of Loan Proceeds (Ie. Payoff Existing Mortgage/Loan, Budget for Improvements, Etc.).

Real Estate Specific:

- Rent Roll, Copies of All Leases, Historic Financials (3 Years)
- Current Zoning Designation for Property
- Most Recent Environmental Report (If Applicable)
- Most Recent Appraisal and Survey (If Available)
- If Purchase:
 - >Signed Purchase Agreement
 - >Broker Contact Information

Contact Information:

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