

Financial Information

Personal Financial Information – For All Owners Over 20%, or Any Other Proposed Guarantors

- Last 3 years personal tax returns.
- Personal Financial Statement
 - Must be dated within 90 days of SBA submission
 - Must be signed by spouse, even if the spouse is not an owner

Business Financial Information - Applicant

- Last 3 years business tax returns
- Current Interim Financial Statement (Income Statement and Balance Sheet)

Business Financial Information – All Affiliates

- Last 3 years business tax returns
- Current Interim Financial Statement (Income Statement and Balance Sheet)
- Debt Schedule, dated to match the most recent available balance sheet

If Debt Refinancing

Loan/Lease Documents

- Copies of loan documents for all loans/leases being refinanced, including:
 - Promissory Note/Credit Agreement/Lease Agreement
 - All Security Documents (Security Agreement, Mortgage, etc.)
 - Guarantees (personal and corporate)