

Loan Readiness Checklist

Use this checklist as a guide as you prepare to meet with your lender

If you are a...

Business Startup

Business Plan

- ☐ Description of location
- ☐ Market analysis
- ☐ Traffic generators
- ☐ Competition
- ☐ Management plan

Financial Projections (2 years month by month)

- ☐ Sources & uses including total project cost
- ☐ Planned revenue & expenses
- ☐ Assumptions/generators

Personal Financial Information

- ☐ Personal Financial Statement
- ☐ Resume
- ☐ Tax Returns
- ☐ Credit History



**Want to talk with
a business coach
as you prepare
these items?**

Book a free call!

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If you are seeking...

Business Expansion/Debt Consolidation

Business Tax Returns and Financial Statements

- ☐ Last Three Years Business Tax Returns
- ☐ Interim Financial Statements (Balance Sheet, Profit & Loss)

Debt schedule

- ☐ Outline terms of existing debt

Projection of expenses & revenues

- ☐ Projection of expenses & revenues

Total cost of expansion

- ☐ Equipment acquisition, real estate, leasehold improvements, inventory, operational capital, etc.

Personal Financial Information

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If you are seeking a...

Business Acquisition

- ☐ Seller Tax Returns and Financial Statements
- ☐ Analysis of business value
- ☐ Two year of revenue & expense projections, with assumptions/justifications

Current Business Tax Returns and Financial Statements

- ☐ Last Three Years Business Tax Returns
- ☐ Interim Financial Statements (Balance Sheet, Profit & Loss)

Personal Financial Information

- ☐ Personal Financial Statement
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