

SBA Loan Document Checklist

Documents to prepare

- ☐ Your SBA loan application form
- ☐ Your personal history statement with your resume and accomplishments
- ☐ Statement of your investment capabilities
- ☐ Current financial statement of all personal liabilities and assets
- ☐ Projection of revenue statement
- ☐ Collateral list

Documents to prepare for an existing business

- ☐ Balance sheet
- ☐ Profit and Loss statements
- ☐ Income statement of previous and current year-to-date incomes including business tax returns
- ☐ Personal financial statement, with each owner itemized including personal tax returns for each owner
- ☐ Collateral list
- ☐ Your DBA or incorporation paperwork
- ☐ Copy of your business lease
- ☐ Loan request statement, describing business history, loan amount and purpose