

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



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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.

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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)

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