

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