

Applicant's Business Name: \_\_\_\_\_

## All Applicants Please Complete:

- First Service SBA Loan Application
- Borrower Information (SBA Form 1919)
- Personal Financial Statement (SBA Form 413)
- Statement of Personal History (SBA Form 912)
- Management Resume (All  $\geq 20\%$  Owners)
- Last 3 Years of Personal Tax Returns
- Requests for Tax Transcripts (IRS 4506-T)
- Clear Copy of Primary ID (Driver's License, State Issued ID, Passport or Military ID)

## If you Own 20% or More in Another Business:

- Please Provide Last 3 Years of Affiliate Company Tax Return

## Existing Businesses Please Provide:

- Last 3 Years of Business Tax Returns
- Interim Financials Covering YTD Figures  
*(Include Income Statement and Balance Sheet)*
- Business Debt Schedule (on Application)
- Relevant AR/AP Data, if Applicable

## For a Commercial Real Estate Purchase:

*(Note: Business Must Occupy  $\geq 51\%$  Of Building)*

- Purchase Contract
- MAI Appraisal Report (Credit Union Will Order)
- Environmental Report (Credit Union Will Order)

## For a Commercial Real Estate Refinance:

*(Note: Business Must Still Occupy  $\geq 51\%$  Of Building)*

- Original Promissory Note
- MAI Appraisal Report (Credit Union Will Order)
- Environmental Report (Credit Union Will Order)

## For a Business Acquisition:

- Last 3 Years of Business Tax Returns  
*(The Seller will provide this information)*
- Request for Tax Transcripts (IRS 4506-T)  
*(The Seller should sign this form)*
- Interim Financials Covering YTD Figures  
*(Include Income Statement and Balance Sheet)*
- Up-to-Date Purchase Agreement

## For Debt Refinance (Business Debt Only):

- Copy of Notes / Credit Card Statements to be Refinanced  
*(Must be in Business Name)*

## For Business Start-Up or Expansion:

- Formal Written Business Plan  
*(Include at least 2 years of projections validated by market research, RMA Comparisons, etc.)*
- Franchise Agreement *(if applicable)*

## Required Business Entity Documents: Sole-Proprietorship (SSN or EIN)

- Fictitious Name Statement
- Business License

## Partnership (EIN)

- Partnership Agreement

## Corporation (EIN)

- Articles of Incorporation
- By Laws

## Limited Liability Company (EIN)

- Articles of Organization
- LLC Operating Agreement