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[www.smallbusinessbank.com](http://www.smallbusinessbank.com)

# Loan Proposal Checklist

Prepared for:

Prepared by:

- 1) **Three Page Application**
- 2) **Bank Authorization Form**
- 3) **3 Months Bank Statements (bank product) or 6 months if required for low income businesses**
- 4) **Copy of Drivers License**
- 5) **Proof of ownership (business license or other document showing ownership %'s)**
- 6) Copy of Social Security Card
- 7) Voided Check
- 8) One year tax returns (bank product only)
- 9) Last months statement from your current cash advance provider
- 10) Lease agreement (minimum of 9 months remaining on the lease)
- 11) Site survey (may be required on certain transactions)

\* **Required for underwriting and pre-approval**

\*\* **Required prior to funding**