COLORADO SHELF COMPANY

SBA Loan Application Checklist

From the guide: Types of SBA Loans - 7(a), 504, Microloans & Eligibility

Use this checklist to organize a discussion with a lender. Requirements are not identical for every program.

- [ ] Legal business name and formation records
- [ ] Ownership details and identification documents
- [ ] Business plan and financing purpose
- [ ] Historical financial statements, if available
- [ ] Business and owner tax returns, if required
- [ ] Current debt schedule
- [ ] Recent bank statements, where requested
- [ ] Cash-flow projections and repayment assumptions
- [ ] Equipment quotations or purchase documentation
- [ ] Property or acquisition documentation, if applicable
- [ ] Collateral details
- [ ] Applicable licenses and registration records
- [ ] Information about changes in ownership or business operations

Important: Do not submit inaccurate documents or represent an inactive company as having years of active business operations.

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