

San Diego Lending, Inc.

Commercial Lending Services

SBA CHECKLIST

- SBA application form
- Resume
- SBA Form 912
- IRS 4506T forms for all entities and personal tax returns
- Copy of all W2's for 2010, 2011 & 2012
- SBA Personal Financial Statement (attached)
- Copy of last 3 months bank statements
- Insurance agent information for property/casualty and business
- Worker's comp
- Key man life insurance
- 2 year month to month business projections
- Business Plan
- 3 years tax returns for business
- 3 years personal tax returns
- 3 years P&L and YTD P&L
- Balance sheet
- Legal entity docs (operating agreement or bylaws, list of corp officers, cert of standing, etc)
- Copy of EIN
- Environmental questionnaire
- Business License
- List of FF&E
- Estimated project costs
- Business Debt Schedule
- Loan payoffs