

Click on blue fields, type in your info - then move onto next blue field. When completely done - save as PDF



New Deal Cover Sheet:

Date: _____

Business Legal Name / DBA: _____

Time in Business / Date Established: _____

Average Monthly Revenue/Deposits - Last 3 Months: _____

Approximate Credit Score of Owner(s): _____

Business Type / Industry: _____

Deal Type (ex: Working Cap, Equip Financing, etc.): _____

Amount Requested: _____ **Partner Name:** _____

Do They Have Any Other Advances or Business Loans? Yes: _____ **No:** _____

****If Yes, please submit deal with a fully detailed Debt Worksheet.**

Do they have collateral to secure the loan? Yes: _____ **No:** _____

****If Yes, please submit deal with a fully detailed Real Estate Worksheet or Facilities List.**