Finance Your Care

Enrollment Document Checklist

Thank you for your interest in enrolling your Practice with Finance Your Care!

Since we provide you with a platform that includes multiple lenders at all credit levels that each have their own required documentation, we wanted to provide this checklist of items that you will need as a part of the lender onboarding process. That way, you will have everything together at one time when we request this information in our welcome email.

Please start gathering and/or be prepared to provide the following information:

- Full business legal name, address, phone number and website address.
- Tax Id for the business.
- Two years of P&L statements (non-audited is fine), or tax returns.
- Copy of medical license
- Copy business liability insurance.
- Copy of a voided check
- Signed W-9 form (we will send you this form).
- Three invoices showing the average amount of a typical procedure.
- Each person that has an ownership interest in the business must provide their legal name, home address, social security number, and date of birth. NOTE: The Lender Administrator will run one soft pull of the owner’s credit report. This will not affect their credit.
- Owner’s Photo ID

When we send you our welcome email, we will provide a safe place to upload these documents.

If you have questions or concerns, please call (844) 995-4657

Work Smarter, Not Harder!