



**CONSULTING**  
Your Business Is Our Business

## Underwriting Checklist

- Application | 1003
- Driver's License
- Business License
- Profit & Loss Statements for the Current & Past 2 Years
- 6 Months Bank Statements (All Pages Blank Pages Included)
- Current Balance Sheet
- Cash Flow Statement
- Business Tax Returns for the Past 2 Years
- Copy of Current Lease or Deed
- Pay-Off Letters For Existing Loans
- Commercial Loan Application
- Debt Schedule
- Credit Authorization
- Rent Roll
- Background Authorization Form
- Executive Summary Form
- Insurance Policies
- Non-Disclosure/Confidentiality Agreement
- Personal Financial Statement for the Buyer to Complete
- Executive Summary of Overview of the Business
- Any Additional Documentation to Substantiate the Financial Representations
- Professional Certificates
- Supplier & Distributor Contracts
- Offer to Purchase Agreement
- Note for Any Seller Financing
- Letter of Intent