

Commercial Loan Forms and Checklist

For all Loans:

- Personal Financial Statement - we can provide a form, or you can utilize one that you have that is less than six months old
- Personal Tax Returns - minimum of the last two years
- Corporate Tax Return - minimum of the last two years
- Business Financial Statements - if available
- Agings - if applicable

If Real Estate Investment:

- Rent roll and income statement
- Paid Real Estate Tax Bill
- Warranty Deed
- Lease Agreements

If Non-Real Estate Collateral:

- Equipment List

If an Acquisition:

- Purchase & Sales Agreement

If a New Business or Startup:

- Pro-forma Financial Statements
- Type of Entity - LLC/C Corp/S Corp/Partnership/Sole Proprietorship most common

If a Construction Loan:

- Construction Budget - we can provide a spreadsheet to help with this if needed
- Construction Contract
- Approved Plans
- List of all Contractors and Subcontractors - significant contractors only is fine

If you have any questions regarding this checklist, please call us at (603) 623-2007 to speak with a Commercial Loan Officer.

We look forward to helping you and your business succeed!