



**SBA LOAN APPLICATION**

Borrower Name:	Contact Person:
	Phone No:
Address:	Fax No:
	Cell No:
Business Structure (S Corp, Sole Proprietor, LLC, etc.):	Email:
	Tax ID No:
	Duns No:

**List of Items Needed**

<p><b><u>Business Financial Information – Sign and Date</u></b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Business financial statements and tax returns - include the last three years with all schedules (also required for a business being purchased)</li> <li><input type="checkbox"/> Interim business financial statements - income statement and balance sheet dated 60 days or less from date of application</li> <li><input type="checkbox"/> Aging of accounts receivable and payable - should coincide with current financial statement</li> <li><input type="checkbox"/> Names, addresses and last fiscal year-end statements of any subsidiaries and/or affiliates</li> <li><input type="checkbox"/> Business Debt Schedule - form to be provided by your banker</li> <li><input type="checkbox"/> Business Plan - for start-up businesses and businesses making major changes to operations, product lines or location</li> <li><input type="checkbox"/> Projected Profit and Loss and Balance Sheets - for start-up businesses making major changes to operations, product lines or location</li> </ul>
<p><b><u>Personal Financial Information - Forms Provided by Lender</u></b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Personal Financial Statement - to be completed by each 20% or more owner/guarantor and spouses</li> <li><input type="checkbox"/> Personal Tax Returns - Complete copies (last 3 years) from each 20% or more owner</li> <li><input type="checkbox"/> Borrower Information Form 1919 - Complete for each 20% or more owner, key officers and directors</li> <li><input type="checkbox"/> Resumes - For all officers and key management</li> </ul>
<p><b><u>Other Documentation</u></b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Purchase Agreement - if buying building or business</li> <li><input type="checkbox"/> Request for IRS Transcript - Form 4506 (provided by lender)</li> </ul>
<p><b><u>Construction and Leasehold Improvement Loans:</u></b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Written cost estimates for the project</li> <li><input type="checkbox"/> Preliminary plans and specifications</li> </ul>

**Loan Information:**

Purpose of Loan:

Requested Amount:

Requested Amortization:

Total Project Costs		
Source of Funds Loan proceeds, loan from seller, personal funds	Use of Funds Equipment, real estate, working capital, etc.	Amount Itemize amounts over \$10,000
		\$
		\$
		\$
		\$
Total		\$

**Collateral Availability-** Note existing loans, liens and estimated values

**Brief History and Description of Business Operations:**

Date formed:

**Affiliations** – Do any principals owning 20% or more of this business have ownership or controlling interest in any other company? If so, explain the affiliation. How many employees does the affiliate business have and what is the average annual revenue for the last three years?

**Business Ownership** – Does the business have a Buy/Sell Agreement among owners? Yes or No

<u>Name</u>	<u>% Owned</u>	<u>Title</u>	<u>Social Security Number</u>

**Debt Schedule** – Please include all debts including both capital and operating leases

Creditor Name and Address	Original Date	Original Amount	Present Balance	Interest Rate	Monthly Payment	Maturity Date	Collateral /Security	Current Status? (Paid, Current, Delinquent)

I declare under penalty of perjury that these statements are true and correct. My/our signature hereby authorizes the release of any information to Sunrise Banks and its affiliates, that they may require at any time related to my/our credit transaction with them. I/we further authorize Sunrise Banks to release this information to any entity they deem necessary for purposes related to my/our credit transaction with them. Sunrise Banks is authorized to check my/our credit and employment history or any other information provided.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_