

Finance Application Checklist (for loans and leases)

General Information

<input type="checkbox"/>	Business name & structure
<input type="checkbox"/>	Address & contact info
<input type="checkbox"/>	Years in business
<input type="checkbox"/>	Employer ID Number (EIN)

Financial Documentation

<input type="checkbox"/>	Recent tax returns
<input type="checkbox"/>	TYD P&L statement
<input type="checkbox"/>	Balance Sheet
<input type="checkbox"/>	Bank statements (3-6 mo)

Ownership Information

<input type="checkbox"/>	List of owners
<input type="checkbox"/>	Driver Lic for each owner

Credit Information

<input type="checkbox"/>	Auth for credit check
<input type="checkbox"/>	Personal credit score

Equipment Info

<input type="checkbox"/>	Equipment quote/invoice
<input type="checkbox"/>	Equipment specifications
<input type="checkbox"/>	New or used status

Additional Info

<input type="checkbox"/>	Insurance details
<input type="checkbox"/>	Voided business check
<input type="checkbox"/>	Collateral documentation

Use this checklist to gather everything you will need before applying for financing. Having these items ready can speed up your approval and find the best terms for your business.



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