

Applicant's Business Name: \_\_\_\_\_

## All Applicants Please Complete:

- First Service SBA Loan Application
- Borrower Information (SBA Form 1919)
- Personal Financial Statement (SBA Form 413)
- Statement of Personal History (SBA Form 912)
- Management Resume (All  $\geq 20\%$  Owners)
- Last 3 Years of Personal Tax Returns
- Requests for Tax Transcripts (IRS 4506-T)
- Clear Copy of Primary ID (Driver's License, State Issued ID, Passport or Military ID)

## If you Own 20% or More in Another Business:

- Please Provide Last 3 Years of Affiliate Company Tax Return

## Existing Businesses Please Provide:

- Last 3 Years of Business Tax Returns
- Interim Financials Covering YTD Figures  
(Include Income Statement and Balance Sheet)
- Business Debt Schedule (on Application)
- Relevant AR/AP Data, if Applicable

## For a Commercial Real Estate Purchase:

(Note: Business Must Occupy  $\geq 51\%$  Of Building)

- Purchase Contract
- MAI Appraisal Report (Credit Union Will Order)
- Environmental Report (Credit Union Will Order)

## For a Commercial Real Estate Refinance:

(Note: Business Must Still Occupy  $\geq 51\%$  Of Building)

- Original Promissory Note
- MAI Appraisal Report (Credit Union Will Order)
- Environmental Report (Credit Union Will Order)

## For a Business Acquisition:

- Last 3 Years of Business Tax Returns  
(The Seller will provide this information)
- Request for Tax Transcripts (IRS 4506-T)  
(The Seller should sign this form)
- Interim Financials Covering YTD Figures  
(Include Income Statement and Balance Sheet)
- Up-to-Date Purchase Agreement

## For Debt Refinance (Business Debt Only):

- Copy of Notes / Credit Card Statements to be Refinanced (Must be in Business Name)

## For Business Start-Up or Expansion:

- Formal Written Business Plan (Include at least 2 years of projections validated by market research, RMA Comparisons, etc.)
- Franchise Agreement (if applicable)

## Required Business Entity Documents: Sole-Proprietorship (SSN or EIN)

- Fictitious Name Statement
- Business License

## Partnership (EIN)

- Partnership Agreement

## Corporation (EIN)

- Articles of Incorporation
- By Laws

## Limited Liability Company (EIN)

- Articles of Organization
- LLC Operating Agreement