Small Business Loan Checklist Template

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| --- | --- | --- | --- | --- |
| **Business Name:** |  | | **Business Address:** |  |
| **Phone Number:** |  | | **Email:** |  |
| **Legal Structure (e.g., LLC, Corporation):** | |  | | | |

**Loan Purpose:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Financial Documentation**

Business Tax Returns (last 2-3 years): 🞎

Profit and Loss Statements (current and previous year): 🞎

Balance Sheet: 🞎

Personal Financial Statements for Business Owners: 🞎

**Business Plan**

Executive Summary: 🞎

Description of Business: 🞎

Market Analysis: 🞎

Marketing and Sales Strategy: 🞎

Operations Plan: 🞎

Financial Projections: 🞎

**Loan Application Form**

* Complete and signed loan application form: 🞎

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| --- | --- | --- | --- |
| **Additional Documentation** | | **Personal Information (Business Owners)** | |
| Business Licenses and Permits:  Commercial Lease Agreement (if applicable):  Collateral Information (if required): | 🞎  🞎  🞎 | Personal Identification (e.g., Driver's License, Passport):  Personal Tax Returns (last 2-3 years):  Personal Financial Statements: | 🞎  🞎  🞎 |

**References**

Professional References (e.g., Accountant, Attorney): 🞎

Supplier or Customer References (if requested): 🞎

**Bank Statements**

* Business Bank Statements (last 6-12 months): 🞎

**Insurance Documents**

* Business Insurance Policies (e.g., General Liability, Property Insurance): 🞎