

# Need a Loan?

## Be Prepared for the Meeting.

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Being prepared for your loan meeting is beneficial for both you and your lender. Below is a short list of items we need to help process your loan request as quickly and efficiently as possible.

- **Business Plan**

A business plan explains what type of business the owner is looking to open, what your financial and growth projections are for your business, and your experience. Basically a business plan is a resume for your business.

- **Tax returns for the past two (2) years**

We ask that you provided your personal and business tax returns. If you are opening a new business, please provide just your personal tax returns.

- **Filing Documents**

We need to know if your business is a corporation (Sub S or Sub C), a LLC, or LLP. Please bring with you a copy of your filing documents when meeting with a loan officer.

- **EIN ID Number**

If you have an EIN ID#, please provide that for the loan officer.

- **Insurance Company**

Please provide the name and phone number of the insurance company that will be insuring your business.

- **Attorney Name or Firm**

Please provide your attorney's name, or firm, and phone number if applicable.

- **Accountant Name or Firm**

Please provide your accountant's name, or firm, and phone number if applicable.

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