

SBA 504 Document Checklist

Business Information

Financial Statements (2 Years)
Interim Financial Statements (Current within 120 Days)
Business Debt Schedule
Federal Tax Returns (2 Years)
Corp/LLC/Partnership Documents (State Stamped)
Business License (Proprietorship)
Franchise Agreement (If Applicable)

Personal Information

This applies to each owner of 20% or greater:

Personal Financial Statement (Current within 90 Days)
Personal Tax Returns (Most Recent)
Personal Resume

Real Estate Information

Real Estate Purchase Agreement or Settlement Statement
Construction Cost Budget
Existing Environmental Studies

Please contact your knowledgeable Business Development Officer for further requirements!