



## ***Loan Application Checklist***

### General:

- |    |  |                          |
|----|--|--------------------------|
| 1. | Community Futures Loan Application Form                              | <input type="checkbox"/> |
|    | a. Personal Statements of Affairs                                    | <input type="checkbox"/> |
|    | i. Other Applicant(s) and/or Corporation                             | <input type="checkbox"/> |
|    | ii. Guarantor(s) (if applicable)                                     | <input type="checkbox"/> |
|    | b. Personal Resumes of applicants(s)                                 | <input type="checkbox"/> |
|    | c. Copies of applicants birth certificates                           | <input type="checkbox"/> |
| 2. | Business Plan  | <input type="checkbox"/> |
|    | a. Proforma Cash-Flow Statement(s)                                   | <input type="checkbox"/> |
|    | b. Verification of Personal Investment                               | <input type="checkbox"/> |
| 3. | Comprehensive list of assets to be used as security                  | <input type="checkbox"/> |
|    | Note: Requires proof of ownership (registrations/bills of sale, etc) |                          |
| 4. | Adequate Life Insurance (for the amount of the loan)                 | <input type="checkbox"/> |
| 5. | Application Fee  | <input type="checkbox"/> |
| 6. | Information Collection Notice and Authorization Form                 | <input type="checkbox"/> |

### Required as Applicable:

- |     |   |                          |
|-----|---|--------------------------|
| 7.  | Signed offers to purchase (if applicable)   |                          |
|     | a. Business   | <input type="checkbox"/> |
|     | b. Buildings  | <input type="checkbox"/> |
|     | c. Land   | <input type="checkbox"/> |
|     | d. Equipment  | <input type="checkbox"/> |
|     | e. Renovations  | <input type="checkbox"/> |
|     | f. Building Construction  | <input type="checkbox"/> |
|     | g. Other _____  | <input type="checkbox"/> |
| 8.  | Copy of all mortgages (residential, business, other real estate)  | <input type="checkbox"/> |
| 9.  | Tax Assessment, Appraisal, or Realtor's Assessment of all<br>Real estate (Personal and business)                    | <input type="checkbox"/> |
| 10. | Comprehensive list of all tools/equipment owned and to be purchased<br>(Note: Include Serial Numbers if applicable) | <input type="checkbox"/> |
| 11. | Lease agreement (if applicable)   | <input type="checkbox"/> |
| 12. | Copy of Trade Certificate (if applicable)   | <input type="checkbox"/> |
| 13. | Provincial/Municipal License  | <input type="checkbox"/> |

### Existing Business Also Require:

- |     |   |                          |
|-----|---|--------------------------|
| 14. | Financial Statements for the past 2-3 years as requested. | <input type="checkbox"/> |
| 15. | Copy of Personal Tax Return                               | <input type="checkbox"/> |
| 16. | Aged list of Accounts Receivable and Accounts Payable     | <input type="checkbox"/> |
| 17. | GST Number  | <input type="checkbox"/> |

Incorporated Companies Also Require:

18. Copy of company incorporation/registration
19. Copy of Corporate Tax Return